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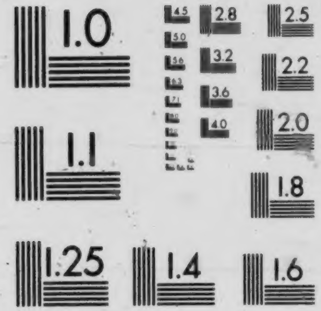
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THE UNIVERSITY OF ALBERTA

# CAREER AND LIFE MANAGEMENT:
# A CASE STUDY OF CURRICULUM IMPLEMENTATION IN ALBERTA

BY

BEVERLEY LYNN BOSETTI

A THESIS
SUBMITTED TO THE FACULTY OF GRADUATE STUDIES AND RESEARCH
IN PARTIAL FULFILLMENT OF THE REQUIREMENTS FOR THE DEGREE
OF DOCTOR OF PHILOSOPHY

DEPARTMENT OF EDUCATIONAL ADMINISTRATION

EDMONTON, ALBERTA
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Dear Lynn:

Permission is hereby granted for you to use in your dissertation the diagrams entitled "Calm Support Network", "Themes, Concepts and Skills", and "Calm Implementation Strategy", that appear in the CALM Interim Curriculum Guide 1987.

Best wishes.

Sincerely,

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The undersigned certify that they have read, and recommend to the Faculty of Graduate Studies and Research for acceptance, a thesis entitled "Career and Life Management: A Case Study of Curriculum Implementation in Alberta" submittted by Beverley Lynn Bosetti in partial fulfillment of the requirements for the degree of Doctor of Philosophy.

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K. A. Wilson

Date: April 13, 1990

# DEDICATION

*For my mother*
*whose encouragement and support*
*made the completion of this dissertation possible*

# ACKNOWLEDGEMENT

There are a number of people to whom I am sincerely grateful for their wisdom, guidance and support in helping me to complete my study. First, I would like to express my gratitude to the participants in this study. Their willingness to share their time, honesty and insights into the implementation process made the study possible. I am especially grateful to the Project Team and members of the Steering Committee for allowing me to be an observer during the planning stages of the implementation process, and for the numerous informal discussions regarding CALM.

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# ABSTRACT

The purpose of this case study was to investigate how the interplay of political, technical, bureaucratic, social and economic factors, as well as the perceptions and dispositions of the actors at the successive levels in the implementation process, influenced the process of making operational a curriculum policy initiative. The study was designed as a two level study. A macro-level perspective was taken of what Alberta Education did to introduce and facilitate the implementation of a policy initiative in combination with a micro-level perspective of the factors which influenced the decision of actors at the local level to become involved in early implementation of the policy.

The analysis of the study was divided into three stages in the implementation of the CALM curriculum. The first stage dealt with the genesis of the curriculum and attempted to answer the question "What factors influenced the development of the CALM curriculum?" The second stage dealt with the administrative processes involved in the development of the curriculum, and included an examination of the strategies and techniques adopted by the CALM Project Team to create an awareness and understanding of the objectives of the new curriculum. The third stage dealt with the processes involved in the actual implementation of the curriculum. Specific factors which influenced principal's decisions regarding whether or not to support the voluntary implementation of CALM were examined. A critical reflection of the process and findings of the study from the perspective of the researcher constitutes a concluding stage of the research.

The major conclusions of the study related to the notion of multiple realities. Implementation had different meanings for people at each successive level in the process. As the curriculum policy initiative was implemented individuals at each level interpreted and responded to it, assigning it a measure of value in terms of its congruence with their personal beliefs and interests, as well as with its implications for their occupational identity, sense of competence and self concept. As the initiative was passed through these

successive levels it was not the curriculum content that was modified, rather it was the ascribed value and priority that differed.

Second, a mechanistic-systems view of implementation with an emphasis on inputs and outputs defines effective implementation in terms of compliance which may inhibit policy makers from hearing or seeing other perspectives of the implementation process which accounts for the realities of practice.

Finally, implementation and subsequent change in practice is a process and not event. The mere mandating of the implementation of a new curriculum does not ensure that the intended goals and objectives will be realized at the classroom level. It takes time to build understanding of and commitment to implementation, whereas pressure can result in mere acquiescence to the mandate.

Among the implications for theory development and research was the need to place more emphasis on the historical and current contexts in which the policy process is embedded. Second was the the awareness that a particular policy cannot be analyzed in isolation from other policies. Analysts need to be cognizant of how a particular policy is interconnected with other policies and with the achievement of broader government, societal and educational goals.

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## Chapter 1

# THE NATURE OF THE STUDY

### Introduction

An implicit assumption in some policy studies is that once a policy has been formulated by a government it will be implemented in a manner fairly consistent with the intent and expectations of the policy-maker (Smith, 1973). This assumption is based on a view of organizational and environmental conditions characterized by tight hierarchical control, a stable environment, reliable technology, and incremental change (Berman, 1978). Educational organizations, however, seldom have these characteristics. Rather they are more representative of loosely coupled organizations with ambiguous technology that operate in a dynamic environment, thereby rendering the implementation of policy much more problematic. Research strongly suggests that the organizational, political, social, and legal context within which a policy is implemented profoundly affects its chances for success (Berman, 1980; Van Meter & Van Horn, 1977; Sabatier & Mazmanian, 1981; O'Toole, 1986). Consequently, there often appears to be a gap between the intentions and statements of policy makers and the final delivery of public services. The bridge between this gap is the study of policy implementation, or in Hargrove's (1975) words, the "missing-link."

### Statement of the Problem

The general purpose of this study was to describe and analyze the processes and strategies involved in the implementation of a policy initiative. The focus of the study was a detailed investigation of how a specific policy initiative from the *Secondary Education in Alberta* policy -- the development and implementation of the Career and Life Management (CALM) curriculum-- was transformed into action. Of primary concern was how the interplay of the political, technical, bureaucratic and socio-economic factors that defined the context in which the policy initiative was embedded were combined with the perceptions and dispositions of the implementers to influence and shape the implementation process.

The following questions were used to guide the investigation undertaken in the study.

A. The Genesis of CALM

1. What factors and/or events influenced Alberta Education's decision to develop a CALM curriculum as a mandatory core requirement for a high school diploma?

B. The Implementation of CALM

2. What strategies and techniques were used by Alberta Education to introduce and implement CALM at the school district level?

2.1 What factors influenced decisions at the local level regarding involvement n the implementation process?

C. Environmental Factors

4.0 How did the social, political and economic environment influence the implementation of the CALM curriculum?

## Significance

The study of policy implementation is still in an incipient stage with various perspectives and emphases being advocated by different theorists. Perhaps there will never be a single theory or perspective that might explain the complex process of policy implementation. The basis of this problem is captured in Fullan's (1982) statement: "Implementation makes further policy; it does not simply put predefined policy into place" (p.79). The study of policy implementation raises the most basic question about the relationship between thought (policy) and action (implementation): "How can ideas manifest themselves in a world of behavior?" (Majone & Wildavsky, 1979, p.177).

The study of policy implementation gives students of politics, policy-makers, and organizational administrators "a new understanding of how the system succeeds or fails in translating general policy objectives into concrete and meaningful public service " (Van Horn & Van Meter, 1975, p.450). Rist (1984) reinforced the need for policy implementation studies because "policymakers have come to realize that it is politically and administratively dangerous to rely on outcome measures of program impact while they are still guessing at the processes that produced those outcomes" (p.161). He suggested that policy studies could benefit from a refocusing of attention on finding out what is "really" going on. Furthermore, policy implementation studies can serve practical purposes by "highlighting a problem (like the relationship between policy and action), sensitizing others to it, and calling attention to persistently-important clusters of variables and relationships" (O'Toole, 1986, p.203).

Finally, the study of the implementation of public policy can contribute to understandings of what government has been doing and what the consequences of those actions have been. It also raises questions of possible alternative courses of action and ways of improving policy implementation. Weiss (1982) reinforced the need for policy studies when she said that such research

> provides a background of data, empirical generalizations, and ideas that affect the way that policymakers think about problems. It influences their conceptualizations of the issues with which they deal; it affects the facets of the issue that they consider inevitable and unchangeable or amenable to policy action; it challenges some taken-for-granted assumptions about appropriate goals and appropriate activities. Often, it helps them make sense of what they have been doing after the fact, so that they come to understand which courses of action they have gone by default. (p.289)

The study of the implementation of the CALM curriculum was significant because it was the first new core curriculum to be developed and introduced into the secondary education curriculum since 1966, when the Grade 10 Physical Education curriculum was implemented. Consequently, CALM provided the opportunity to investigate an implementation process as it was actually occurring.

CALM was also significant because it posed a number of challenges to the Alberta Education Implementation Team, administrators and teachers. First, because CALM was a required course for the completion of an Alberta high school diploma it had a direct impact on students' access to complementary courses, and it had significant implications for staffing, resource allocation and course redundancy.

Second, teachers were faced with the challenge of acquiring the knowledge and skills to teach the CALM curriculum effectively because it focused on critical thinking and process skills which involved methods unfamiliar to many teachers. This had pervasive implications for teacher preparation and inservice education across the province. Alberta Education developed a strategy to facilitate inservice education on a wide scale by incorporating the concept of distance learning. Alberta Education, in cooperation with the ACCESS Network, developed a series of video productions that were initially aired in April, 1988 on the ACCESS television network. These broadcasts included an "on the air" interactive component that involved a telephone information "Hot Line" through which viewers could talk to the program's host. Alberta Education also encouraged schools to conduct their own inservice programs using these video tapes.

Finally, as a result of the *Secondary Education in Alberta* policy statement, the secondary education system was projected to undergo extensive curriculum revisions and changes. Consequently, the timing and manner of the implementation of the various directives, CALM being the first, was of importance because of the potential disruption these changes could create in the everyday life of participants in the school system.

## Background to the Study

In response to increasing public criticism and concern over education the Alberta Government initiated a major review of the secondary education program in the province.

The intent of the review was to determine the extent to which secondary programs were meeting the needs, values, and expectations of Alberta society as a whole. To assess the need and direction for change in the secondary education program the Government adopted a consultative approach through which members of the public and major stakeholder groups (teachers, administrators, business community, students, parents) participated. The Government believed that since educational policy has such a pervasive effect over the lives and future of the public, they should have the opportunity to become involved in its formulation and consequently in setting the future direction of the secondary education program in Alberta (Minister of Education, 1986). Additionally, the Government felt that by involving the public in the formulation process Alberta Education would have the opportunity to test and expand the public's zone of tolerance for educational change by increasing their understanding of the need for change and by providing them with an opportunity to develop a sense of ownership in the policy. Finally, this consultative process was intended to engender a sense of readiness for and acceptance of the proposed change (Deputy Minister of Education, 1986).

The context in which the *Secondary Education in Alberta* policy was formulated and adopted is significant for understanding what was happening during its implementation (Bosetti,1986). The formulation of the policy took place over sixteen months (February,1984 to June, 1985) and was characterized by strong support from Premier Lougheed together with the Legislature. It was directed by then Education Minister, David King, who shared the Premier's vision of the future of education. Finally, the formulation process enjoyed high media coverage and strong financial support. The outcome was three documents that reported the results of the Secondary Education Review as well as recommendations for the final policy. On June 12, 1985, the thirty-three page policy statement was released. While the formulation of the policy took place in a fairly stable political, social and economic environment, the implementation of the policy did not enjoy the benefits of a similar environment.

The Career and Life Management (CALM) curriculum was designated as a core course for high school students in the Alberta Secondary Education Policy, 1985. The need for such a curriculum evolved as a result of several briefs and position papers that were submitted to the Secondary Education Review Committee indicating the need and support for a course which would provide students with practical skills and knowledge for "everyday living." In addition, there were a significant number of responses to a questionnaire distributed by Alberta Education that referred to a need for access to such course content. In response to these perceived needs the Policy Statement (1985) described the proposed curriculum content as follows:

> career, personal finance, and life management skills, including personal development, interpersonal relationships, effective learning skills, career planning, skills and attitudes required in the workplace, preventive alcohol and drug education, and other relevant social issues. (p.24)

CALM was authorized for development by the Honourable Neil Webber, Minister of Education, on March 3, 1986.

## Conceptual Framework

The study was based on the assumption that the policy process has no existence apart from the individuals and groups who define it. The policy implementation process is shaped and constructed through the network of meanings created by the people involved in the successive levels of the implementation process. These people's perceptions, values, attitudes and beliefs reflect their personal characteristics, experience, and position within the social structure in which they are embedded.

The study was conceptualized at two-levels. A macro-level perspective focused on what Alberta Education did to introduce and facilitate the implementation of a policy initiative, and a micro-level perspective examined the factors which influenced the decision of administrators and teachers to become involved in the early implementation of the policy initiative.

A macro-micro perspective of policy integrates the macro-world of the policymaker with the micro-world of the policy implementer (McLaughlin, 1987). This perspective was significant for a number of reasons. First, with the increasing trend toward the consultative mode of policy formulation, this study examined the extent to which such a formulation process enhanced or facilitated policy implementation. Second, the study examined the basis upon which actors in the successive levels of the implementation process made decisions regarding when and how to implement a policy initiative. Third, the perspective of constructed realities and individualized meanings drew attention to the problem of fidelity in the implementation of mandated policy initiatives, which has implications for the monitoring and evaluation of the policy implementation process. Analysis from this perspective asked the questions "What constitutes successful implementation?" and "What constitutes a good policy?"

## Assumptions

The following assumptions were made in the conduct of the study:

1. An analysis of the genesis and early stages of the implementation of the Career and Life Management curriculum was assumed to be of significance for the future development and implementation of other *Secondary Education in Alberta* policy initiatives, as well as the implementation of educational policy in general.

2. An extensive review of the current literature of policy implementation and educational change indicated that there was still much to be learned about the complex process of policy implementation in the educational setting. Thus, it was assumed that the descriptive nature of this study would contribute to knowledge in this area.

3. A qualitative research orientation was considered appropriate for conceptualizing the research process and for fulfilling the purpose of the study. Due to the exploratory nature of the study, interviews and primary source document analysis were assumed to be the most effective method of researching the process of implementing CALM.

## Delimitations of the Study

The study was bounded by the time period from June, 1985 to June, 1988. The first date serves as a natural beginning point because the *Secondary Education in Alberta* policy was released officially on June 12, 1985; however, the terminating point was more difficult to define because the implementation of the policy was to be phased in over a period of six to eight years. The decision to end the period of study in June, 1988 was based on a number of reasons. The intent of the study was to investigate the early stages of the implementation process, and more specifically to describe and explain how Alberta Education translated the *Secondary Education in Alberta* policy statement into a plan for action. To facilitate this, the study focused on the implementation of one of the policy directives: the development and implementation of the Career and Life Management curriculum (CALM). This curriculum was approved for development by the Minister of Education on March 3, 1986 the first phase of voluntary implementation was completed by June, 1988, with mandatory implementation scheduled for September, 1989.

## Limitations

The following limitations applied to the study:

1. The study was limited by the willingness of individuals to be interviewed, by their ability to recall accurately events of significance, and by their willingness to divulge particular information.

2. Because the development and implementation of the CALM curriculum were occurring as the study was being conducted, the researcher had to rely on interview data and participant observation to identify undocumented decisions and events. Additionally, primary source documents (i.e., working documents, proposals, memos, reports) were used whenever possible to supplement the interview data.

3. The conclusions and recommendations of the study are based on a single case study and therefore have limited generalizability.

4. The study focused on the early stages in the implementation of CALM. Those actors who provided data for the study became involved in the implementation process on a voluntary basis and, consequently, may not be representative of those who will be involved in the mandatory phase.

## Definition of Terms

The key terms used in this study are defined below in order to clarify their contextual meaning.

*Policy:* "A policy is a philosophically based statement which is goal oriented and establishes the direction for future discretionary action" (Alberta Education, *Program Policy Handbook* ).

*Genesis* : This term is used to denote the inception of the CALM curriculum. It describes the activities and processes which supported and guided the identification of the need for the development of the CALM curriculum. In addition, it describes the contextual conditions in which the development and implementation of CALM was embedded.

*Implementation* : This term was used to describe the processes involved in putting a policy directive into practice. In this study the implementation process began with the genesis of the CALM curriculum, then moved to the second stage, the acceptance and consequent adoption of the curriculum at the local level, to the final stage, the agreement by principals to include the curriculum in their secondary education program offerings before the mandatory implementation date.

*Policy Initiative* : A term used to describe the directional statement in the *Secondary Education in Alberta* policy document indicating the need to develop a course involving careers, personal finance, and life management.

*Curriculum* : A term used to describe the substantive content of a program of study.

## Organization of Thesis

The thesis is organized into eight chapters. The first three chapters discuss the research design and research methodology adopted for the study. As well, they provide an overview of the pertinent literature related to models of policy implementation, strategies for implementation, as well as factors that influence effective implementation. In essence, the first three chapters describe the theoretical orientation of the study.

The body of the thesis is divided into three chapters, each representing a particular phase in the implementation process: the genesis of CALM (Chapter 4), the development and acceptance of CALM (Chapter 5), and the commitment to and implementation of CALM (Chapter 6). The seventh chapter is a discussion of the findings of the study from the researcher's perspective. The concluding chapter provides a summary of the study and a discussion of the conclusions and implications for both theory and practice. The chapter ends with a a final comment on policy implementation in Alberta and recommendations for future research.

# Chapter 2

# RELATED LITERATURE

This review of the policy literature provides an overview of the policy implementation process from multiple perspectives in an attempt to identify pertinent variables that appear to be influential in effective implementation. Initially, implementation is viewed from a systems perspective and is followed by an analysis of the phenomenology of the implementation process. Finally, the review attempts to synthesize those factors that are influential in facilitating successful implementation at the local level.

## Policy Implementation

Implementation refers to a process of carrying out a policy or program decision (Berman, 1978; Pressman & Wildavesky, 1979; Williams, 1976 ). Depending upon the theoretical orientation, there is some variation as to what constitutes the implementation process. O'Toole (1986) pointed out that some implementation researchers refer to implementation as "all that is part of the process between initial statement of policy and ultimate impact on the world." Other researchers restrict implementation to "the actions of those charged with handling a policy." This definition excludes the behavior of actors not officially designated as policy implementers but who are instrumental, in a political or technical sense, in converting the policy into action. As well, it assumes that the prescribed actions are likely to have the expected effects on the real world (p.183).

There is general agreement that the process of policy implementation can be described as technically simple, but socially complex (Berman & McLaughlin, 1976; Fullan, 1982; Hall, 1985). The complexity involved in the implementation of a policy initiative can be made clearer by examining the process from a systems perspective. The happens in the classroom) can be tightly coupled. The problem lies in the assumption that decisions will endure the successive levels of the implementation process. Consequently, what happens in the classroom will conform to, or be consistent with the desired behaviour inherent in the initial policy decision (Olson, 1985, p.297). However, as policy passes through and is implemented sequentially by various organizational levels the output of one implementation organization becomes the input of the next organizational level, and the end result at the classroom level is the implementation of a policy that has been adapted to meet the needs and characteristics of individuals at the various levels. McLaughlin, (1987) explained that in implementation

> change is ultimately the problem of the smallest unit. At each point in the policy process a policy is transformed as individuals interpret and respond to it. What is actually delivered or provided under the aegis of a policy depends finally on the individual at the end of the line. (p.174)

Thus, it becomes apparent that ultimately, the power to determine the impact of a policy rests at the local level, not at the policy formulation level. Pressman and Wildavsky (1973) reinforced this point when they stated that "the consequences of even the best planned, best supported, and most promising policy initiatives depends finally on what happens as individuals throughout the policy system interpret and act on them." Therefore, "policy at best can enable outcomes, but in the final analysis it cannot mandate what counts" (McLaughlin, 1987, p.173).

## Stages in the Implementation Process

A number of models have been developed which attempt to delineate the policy implementation process. In general, the majority of models recognize that the implementation process involves at least three phases: initiation or adoption, implementation, and continuation or routinization. Additionally, the implementation process is not perceived as a linear process, rather it is a continuous and interactive process; events that occur in one phase may feedback to alter decisions taken in previous stages (Fullan, 1982; Berman & McLaughlin, 1976).

## Phase One: Adoption / Mobilization

The first phase in the implementation process is variously referred to as preparation, adoption, initiation, planning, or decision making (Conner & Patterson, 1982; Fullan, 1982; Schneider, 1982; Williams, 1976). Fullan (1982) defined this phase as "the process which leads up to and includes a decision to adopt or proceed with a change" (p.3). He explained that the decision to adopt an innovation (program or policy) is based on the assumption that it responds to certain commonly held values and meets needs better than existing practices. Williams (1976) viewed the adoption phase as a decision making process wherein policy makers and policy implementers view the preliminary policy specifications to determine how to make them operational, and how to raise organizational capabilities to implement these decisions (p.180). Conner and Patterson (1983), however, referred to the initial phase in the implementation process as the preparation phase wherein the actors came into contact with, and were aware of, the proposed change. The adoption phase, or in their terms the acceptance phase, was not encountered until the actors had attained a degree of understanding of the purpose and intent of the policy initiative, and could articulate a personal position regarding their support for, or opposition to, the proposed change. This transition was defined as crossing the "disposition threshold" (p.3).

Berman (1981) viewed the initial phase in the implementation process as involving mobilization activities. These activities can be categorized into four major groups: 1) policy image development, 2) planning, 3) generating internal support, and 4) generating external support. The overall goal in the initial phases of implementation is to attain a common image and understanding of the meaning, intent, and substance of the policy or program, and to attain a commitment to the policy's goals and objectives. Fullan (1982) identified ten critical factors that influence the adoption of an innovation: 1) existence and quality of innovation, 2) access to information, 3) advocacy from central administration, 4) teacher pressure/ support, 5) consultants and change agents, 6) community pressure /support/ apathy/ opposition, 7) availability of federal or provincial funds, 8) new central legislation or policy, 9) problem-solving incentive for adoption, and 10) bureaucratic incentives for adoption (p.42).

### Phase Two: Implementation (Adaptation and Clarification)

The second phase in the implementation process is the actual carrying out of the program or policy decision. Williams (1980) argued that whatever technical approach is adopted to implement a policy, the central problem is to adapt that approach to meet the political, economic, social, bureaucratic, organizational and technical circumstances of the particular setting (p.3). Proponents of the adaptive approach to implementation would identify adaptation and clarification as being the two fundamental attributes of the implementation process (Berman, 1981; Berman & McLaughlin, 1976). Adaptation refers to the process of shaping the initial innovation design to meet the needs and values of the particular organizational setting. At the same time, the organization and its members must adapt to the demands of the innovation (Berman & McLaughlin, 1976; Fullan, 1982; Hall & Loucks, 1982). Clarification is the process by which individuals come to understand the meaning, goals and objectives of the innovation, and their role expectations in the process.

Conner and Patterson (1983) referred to the implementation phase as the commitment phase which they subdivided into four stages: installation, adoption, institutionalization, and internalization. They explained that once organizational actors had developed a positive view and disposition toward the policy decision, they then took the steps necessary to make the decision operational. This transition phase was defined as the "commitment threshold" (p.4). The policy decision is initially implemented on an experimental or temporary basis wherein the actors determine how the change works and the initial technical and human repercussions of its implementation.

Fullan (1982) identified four categories of factors that influence effective implementation at various levels in the organizational hierarchy. The first set of factors includes an assessment of the nature and characteristics of the change itself to determine if it addressed priority needs, if the goals and means of implementation were clearly stated, the difficulty and extent of change required by actors, and finally, the quality and practicality of the learning materials, technologies, or other products used to support implementation (p.59).

The second category of factors is related to the characteristics of the school district level and focuses on the social conditions of change. They included the district's history of innovative attempts; the degree to which the district utilized a problem-solving approach at the adoption stage combined with planning ahead for implementation; district administrative support; opportunity for staff development and participation during implementation; realistic implementation time-line and information regarding student achievement and implementation problems; and finally, school board and community characteristics.

The third category described school-level factors that influence implementation. This category focused on the concept that change involves resocialization, and included such factors as the degree of support and involvement of the principal in the implementation process and teacher-teacher or peer relationships, and teacher sense of efficacy.

The final category of factors which influence implementation placed school districts and schools in the context of broader society. These included the relationship between government agencies and the local school system, and the extent to which each side was cognizant of the subjective world of the other. The second factor was the quality and amount of financial and technical assistance provided by the government to school districts during implementation.

### Phase Three: Incorporation / Institutionalization

The final phase in the implementation process is the institutionalization of the change -- the incorporation of the innovation into the routine behavior of the local organization. Berman and McLaughlin (1977) contended that institutionalization involves the school staff assimilation of what they have learned during the implementation process, as well as the district's incorporation of new routines created by the innovative process into decision making about budget, personnel, support services, and instruction.

## Top Down Perspective of Implementation

In many cases, policy decisions are made at the top of the organizational hierarchy by government officials and implementation is delegated to lower levels of the organization. Berman (1978) identified the difficulties that occur as a policy is implemented through successive levels of the organization. Macro-implementation refers to the process of translating a policy decision through successive levels of governmental agency operations in an attempt to stimulate the adoption and compliance decision from local agencies. Micro-implementation refers to the process of change necessary within the local agency in an attempt to implement the policy decision. The essential problem is that there are many layers that stand between decisions made at the top of the organizational hierarchy and the ultimate impact of that decision at the operating level. The degree of fidelity with the original policy decision is contingent upon the degree of consonance between the local organization's goals and interests, and those of the mandated policy. The challenge implementers face is to bring together the necessary commitment, communication, and capacity to transform the policy decision into action (Williams, 1980). The cardinal command for policy planners and implementers is to "look down toward where services are provided, that is the crucial point of policy determination" (Williams, 1980). The crux of the implementation problem is that the crucial factors that affect the behavior of implementers is beyond the direct control of policy makers and include the "individual motivation and commitment, and the interaction and mutual support of people in work groups" (Elmore, 1978, p.215). Policy does not exist in any concrete sense until implementers have "shaped it and claimed it for their own; the result is a consensus reflecting the initial intent of policy-makers and the independent judgement of implementers" (Elmore, 1978, p.216).

## Implementation Strategies: An Organizational Perspective

The policy implementation literature reflects a number of different implementation strategies, each emphasizing a certain theoretical orientation, yet all dealing with similar implementation problems. The kind of strategy adopted for an implementation situation is contingent upon the level of implementation in terms of the successive levels in the organizational hierarchy, as well as certain environmental and contextual factors that characterize each implementation situation. An appropriate conceptualization appears to involve a number of continua, in which a particular implementation situation, depending on the contextual variables, would fit somewhere between the two extremes. Some of the predominant continua are variations of the top-down (mandated change) vs bottom-up (locally initiated change); adaptive vs planned implementation; and finally the fidelity vs mutual adaptation approach. Berman (1980, p.214) delineated five parameters that characterize an implementation situation and assist in determining the most suitable implementation strategy. He suggested that the more structured the situation, the more conducive it is to a planned or programmed implementation approach; conversely, the more unstructured the situation, the more conducive it is to an adaptive approach to implementation. Thus, the "effectiveness of implementation strategies depends on how they interact with constraints inherent in the policy situation" (Berman, 1980, p.213). Ideally, policy makers should choose implementation strategies which match different contextual conditions.

## Four Perspectives on the Implementation Process

Elmore (1978) identified four organizational models that represent four major perspectives of organizations and the implementation process. These models included the systems management model, the bureaucratic process model, the organizational development model, and the conflict and bargaining model. While these models were presented as distinct approaches, no one perspective can adequately address the political, bureaucratic, and social complexity of an implementation situation. Therefore, characteristics of the various models may be evident at different phases in the implementation process, as well as at different levels of implementation in the organizational hierarchy. The utility of the four models is that they assist policy implementers to recognize their theoretical orientation and perhaps expose them to alternative ways of viewing and dealing with the implementation situation.

## Model I: Implementation as Systems Management

The systems management model is bureaucratic in nature. The parts of the system are arranged to ensure that the central directives will be implemented. The model assumes that system actors (policy implementers) will act according to the system plan, and if they do not, the nature of the system will adjust to improve the link between the policy directives (input) and the policy implementation (output) process. The model rests on the assumption that policy implementers will find goals understandable and will have the technical capacity to implement those goals. The problem faced by many system managers is to develop a plan to operationalize sometimes ambiguous policy into clear and attainable policy objectives.

Second, the system management model presupposes the existence of a controlling and coordinating authority. Hierarchical control is integral to insuring organizations behave as systems. Thirdly, the model makes the assumption that there is consonance among the values inherent in the policy, the value framework of policy implementers, and the values of the policy benefactors, so that cooperation during the implementation process is not a problem (LaRocque, 1986). Finally, successful implementation is contingent upon the power of the policy implementers to apply social sanctions and to hold subordinates accountable for their performance (Elmore, 1978, p.195).

From the perspective of the Systems Management model, implementation failure is the result of poor management in developing an implementation plan with clear and consistent policy objectives, the poor allocation of responsibilities, unclear expected outcomes, and lack of accountability of actors for their performance. Hence, effective management is contingent upon goal-directed, value maximizing behavior.

The weakness of this model is that few examples of its use can be found in the public policy implementation literature. Elmore (1978) attributed this to the tendency for implementation of public policy to pass through a number of successive layers in the bureaucratic hierarchy which involvies a number of implementation agencies (p.197). In this model the implementation agent is directly subordinate to higher management. When the policy is implemented in these different agencies the lines of authority become blurred as does management control across jurisdictional boundaries. This makes the model an inadequate description of the reality of organizational life; however, it still has utility in directing attention to the mechanisms policy makers and administrators use to control implementation behavior.

### Model II: Implementation as Bureaucratic Process

The essential characteristic of the bureaucratic process model is the administrative control of routine and discretion at the point of delivering the policy initiative from the agent to the client. Elmore (1978) suggested that

> [t]he growth of large public service agencies has created a distinguishable class of bureaucrat--one who shoulders virtually all responsibility for direct contact with clients, who exercises a relatively large degree of discretion over detailed decisions of client treatment, and who therefore has considerable potential impact on clients. From the client's perspective, the street-level bureaucrat is the government. (p.202)

The problem that the "street-level bureaucrat" must confront is how to develop coping mechanisms or routines that create some semblance of order and stability in an otherwise unpredictable, and dynamic social environment. When the "street-level bureaucrat" is faced with a new mandate (policy) that must then be translated to meet the varying needs of the organization's clients, requiring a subsequent increase in the program delivery agency's workload as well as a disruption in their established routine, the prospect of implementing a new policy is usually greeted with resistance (Lieberman, 1982). Consequently, the program delivery agency may adjust to the "near occasion" of the change, selecting or modifying that which is familiar and eliminating the real change (Fullan, 1982). Policy implementation failure might then be attributed to the division between the policy-making and the operations sphere resulting in an inadequate understanding of, and sensitivity to, the social reality of the implementing organization (Fullan, 1982).

The essential utility of this perspective of organizations and policy implementation is that it draws attention to how bureaucratic routines provide a buffer against change and uncertainty, and consequently are difficult to modify as they have immediate utility to the people who developed and use them. Elmore stated (1978) that "Failing to account for the force of routine in the implementation of policy leads to serious misperceptions" (p.207).

### Model III: Implementation as Organizational Development

The organizational development perspective is based on the assumption that

> the closer one is to the source of the problem, the greater is one's ability to influence it; and the problem-solving ability of complex systems depends not on hierarchical control but on maximizing discretion at the point where the problem is most immediate. (Elmore, 1979, p.605)

Thus, this perspective advocates the inclusion of local level policy implementers in the formulation of the content of the programs to be implemented. This strategy is based upon the belief that local level implementers (i.e., teachers) are in the best position to effectively diagnose problems that lie at the heart of the change (policy) effort, and should therefore not only be included in the program decision-making process, but should be given adequate discretion to implement the program to meet the specific needs of their clients (Olson, 1985).

Successful implementation efforts could be anticipated by looking at

> the extent to which implementers are involved in the formulation of a program, the extent to which they are encouraged to exercise independent

> judgement in determining their own behavior, and the extent to which they are encouraged to establish strong work groups for mutual support and problem-solving. ( Elmore, 1978, p. 212)

The significance of the organizational development model is that it effectively turns the entire implementation process on its head. Thus, the capacity to implement originates at the bottom of the organization and flows to the top. The crucial factors that affect the behavior of implementers are beyond the direct control of management and include the "individual motivation and commitment, and the interaction and mutual support of people in work groups" (Elmore, 1978, p.215).

In brief, the organizational development model takes the position that policy does not exist in any concrete sense until implementers have "shaped it and claimed it for their own; the result is a consensus reflecting the initial intent of policy-makers and the independent judgement of implementers" (Elmore, 1978, p.216). The most that each level of government can do to influence and direct the implementation process is to provide the support, resources, and opportunity for local implementers to engage in a problem-solving approach to understanding and implementing the policy directives. Berman and McLaughlin (1976) referred to this strategy as mutual adaptation, in which implementation is viewed as a process of shaping a policy to meet the needs and values of the particular organizational setting while at the same time the organization and its members adapt to the demands of the innovation.

A weakness inherent in the organizational development model is that it attributes so much significance to the concepts of consensus, cooperation, and interpersonal ties, that it does not address the problem of conflict, and the possible breakdown in consensus; nor does it address such influential factors as the dynamic political and economic environment and its effect on the change process.

### Model IV: Implementation as Conflict and Bargaining

The conflict and bargaining model is characterized by the struggle to maintain a balance between centralized and decentralized control of the implementation process. Implementation becomes a series of strategic moves by individual subgroups to meet their own ends. Implementation failure is the result of the lack of power of any single subunit to coerce or persuade the others to conform to a single conception of the policy. From the perspective of this model the outcomes of policy implementation are the result of bargained solutions and are temporary in nature. Allison (1971) makes this point when he stated that

> the decisions and actions of government are...political resultants...in the sense that what happens is not chosen as a solution to a problem but rather results from compromise, conflict, and confusion of officials with diverse interests and unequal influence. (p.162)

The conflict and bargaining process does not proceed on the assumption of the existence of hierarchical control, a predicable set of routines, consensus and commitment to a common set of values and objectives; rather it proceeds on the basis that participants in the bargaining process are locked together by their dependency on conflict and the necessity to preserve the bargaining arena in order to gain access to something of value (Elmore, 1978, p.219). The success or failure of the implementation process is, therefore, a relative notion dependent upon the relative advantage of each group in the bargaining process.

The major contribution of the conflict and bargaining model to the understanding of policy implementation is that parties involved in the process can proceed without the coordination and control of higher management; it requires only that the participants agree on the necessity to bargain. Secondly. the model provides a framework for describing and interpreting the events in the implementation process without attributing any overall purpose to them. This, however, is also the major weakness of the model because it does not permit an objective definition of the success or failure of the implementation effort since this definition is contingent upon positions of relative advantage in the bargaining process. Finally, the model fails to provide a basis for recommending how to improve the implementation process.

## Variables Affecting Effective Policy Implementation

Nakamura and Smallwood (1980) argued that "the particular organizations and institutions chosen to implement policies can significantly influence how those policies are carried out" (p.53). Despite the implementation strategy or approach adopted to carry out the policy or program decision, implementers within these organizations must deal with a common set of issues that relate to internal organizational procedures (communication clarity, accuracy, speed, complexity); allocation of resources (money, time constraints, adequacy and competency of staff, power); psychological motivation and bureaucratic norms (multiple realities, perceptual screens, organizational culture); and finally communication networks and compliance mechanisms (Nakamura & Smallwood, 1980).

The following is a summary of what various researchers have determined to be critical factors in effective implementation. While these factors reflect the four categories of common issues identified by Nakamura and Smallwood (1980), each list emphasizes a particular theoretical orientation.

### Factors Affecting Implementation

**O'Toole (1986)**

1. Policy characteristics (clarity, specificity, flexibility of goals and procedures, validity of policy's causal theory)
2. Resources (financial and other)
3. Implementation actors or multiple actor structure
4. Number of actors
5. Attitudes and perceptions of implementation personnel
6. Alignment of clientele (p.189)

**Van Horn and Van Meter (1977)**
1. Communication process
2. Disposition of implementers
3. Enforcement mechanisms
4. Characteristic of implementing agency
5. Political conditions
6. Economic and social conditions
7. Policy standards and objectives
8. Resources (p.109)

**Berman and McLaughlin (1976)**
1. Local development of materials
2. Staff training keyed to local setting
3. Adaptive planning
4. Critical Mass

**Sabatier and Mazmanian (1980)**
1. Clear and consistent objectives
2. Adequate causal theory
3. Implementation process legally structured to enhance compliance by implementing officials and target groups
4. Committed and skillful implementing officials
5. Support of interest groups and sovereigns
6. Changes in socio-economic conditions which do not substantially undermine political or causal theory

**Fullan (1982)**
1. Characteristics of the change
    - need or relevance of the change
    - clarity
    - complexity
    - quality and practicality of program

2. Characteristics of the School District Level
    - history of innovative attempts
    - adoption process
    - central administrative support and involvement
    - staff development and participation
    - time-line and information system
    - board and community characteristic

3. Characteristics of School Level
    - the principal
    - teacher-teacher relations
    - teacher characteristics and orientations

4. Characteristics external to the Local System
    - role of government
    - external assistance

In the preceding list of factors that influence implementation it is apparent that each list bears a certain degree of consistency and that these factors require some elaboration. The factors that will be discussed relate mostly to a provincially mandated policy.

## Communication

Policy standards and objectives must be communicated with sufficient clarity to implementers to enable them to know what is expected. Communication linkages become problematic when dealing with provincially mandated policy. Policy standards and objectives must pass through four successive levels of implementation operations (Alberta Education to school boards, school board to school principlas, and school principals to classroom teachers). This has a number of implications for communication linkages. First, in the successive levels of implementation the output of one level becomes the input of another level, and second, the message must pass through the selective perceptions of a number of key actors at each level. Consequently, the message may be distorted as the receiver places his or her own emphasis and interpretations on the uniform statement. Van Horn and Van Meter (1977) identified three key questions related to the communication process that should be addressed by the implementation coordinator. They point to the need to examine the accuracy, clarity, consistency, and timeliness of the communication compared with the policy standards, as well as the information going to a particular locality over time. The field representatives' interpretation and understanding of the program and their definition of acceptable local performance is also of significance in the communication of and compliance with policy standards. Finally, the emphasis that the implementors place on particular policy standards in their consultation with school disitrct and local officals affects the level of compliance (p.109).

### Enforcement

Successful implementation of a policy is contingent upon the compliance mechanisms and procedures built into the implementation process that increase the likelihood that the implementers will act in a manner consistent with policy standards (Van Horn & Van Meter, 1977, p.110). Policy makers are faced with the problem of achieving a balance by articulating a policy flexible enough to endure the modifications made during the implementation process, and still satisfy its goals and objectives in the policy outcome. Since government determines what will be taught, and the local districts determine how it will be taught, then the government policy must define the amount of flexibility to be tolerated during the implementation process. The central issue becomes "how can one set of actors influence another set of actors to carry out policy directives, particularly if there is disagreement over those directives?" (Nakamura & Smallwood, 1980, p.60). Officials have essentially three means of achieving compliance from policy implementers:

> •Physical (coercive) power-the application, or the threat of application, of punitive sanctions.
> •Material (utilitarian) power-the allocation of material resources such as goods and services (e.g. salaries, commissions, fringe benefits).
> •Symbolic (normative) power-the allocation and manipulation of symbolic rewards and deprivations (e.g. prestige, esteem, love, acceptance).
> (Etizioni,1964, pp.59-60)

Nakamura and Smallwood (1980) have identified a number of problems related to securing compliance of policy implementers. First, there is the problem of vague or ambiguous social policy initiatives that do not permit evaluation of intermediary performance by easily measurable criteria. A second problem is the limitation in the perceived legitimacy of the options that can be employed by those who are attempting to secure compliance. Many of the negative sanctions that can be used within organizations are not appropriate ways to control loosely coupled institutions that have local monopoly over schooling. Pincus (1976) suggested that incentives for implementing an innovation relate to such factors as bureaucratic safety, response to external pressure, and approval of peer elites (p.50). Finally, Berman and McLaughlin (1976) made the point that implementation can be characterized by three processes: mutual adaptation, non-implementation or symbolic implementation, and cooptation. In attempting to secure a certain degree of fidelity in the implementation process they suggested that implementers provide the opportunity for local practitioners to develop a sense of ownership in the innovation through the following four activities: 1) Adaptive planning, which they described as involvement in planning activities which are congruent with the needs of the project and the participants; 2) Staff training keyed to the local setting. They stated that teachers preferred concrete "how to do it" workshops directed by experienced and empathic leaders; 3) Local material development and a "learning by doing" approach to inservice or pilot testing. This approach gives the practitioner an opportunity to work through and come to an understanding of the project precepts as well as have the opportunity to develop a sense of ownership in the project methods and goals; 4) It is important that practitioners have the opportunity to establish a support network with fellow implementers to provide the chance to share concerns, ideas, fears and anxiety about implementing the new program. Additionally, this support group can reduce the feeling of isolation often felt by the implementer of a new program, thereby creating a norm for change in the setting. Berman and McLauglin (1976) referred to this support group as a "critical mass" (p.360-361).

### Disposition of Implementors

The success or failure of a policy may be attributed to the commitment, understanding, and support within the agency responsible for implementation. As a result of an investigation into the receptivity or lack of receptivity to innovation, McLaughlin (1976) concluded that within the implementation arena "the amount of interest, commitment, and support evidenced by the principal actors had a major influence on the prospects for success" of the policy. Van Horn and Van Meter (1975) discussed three conditions which may frustrate successful implementation, even when policy standards are communicated with accuracy, clarity, and consistency. These conditions are contingent upon the implementer's cognition (comprehension) of the policy standards; the direction of their response toward the policy (acceptance, neutrality, rejection); and finally, the intensity of their response to the policy directives (p.472).

Fullan (1982) suggested that successful implementation at the local level takes

> a fortunate combination of the right factors--a critical mass--to support and guide the process of resocialization which respects the maintenance needs of individuals and groups and at the same time facilitates, stimulates, prods people to change through a process of incremental and decremental fits and starts on the way to institutionalizing or discontinuing the change in question. (p.79)

## Characteristics of Implementing Agency

Implementing agencies can be characterized by their formal structural features as well as by the informal attributes of their personnel. Van Horn and Van Meter (1975) identified six characteristics that may impinge on an organization's capacity to implement policy: the competence and size of an agency's staff; the degree of hierarchical control of subunit decisions and processes within the implementing agencies; an agency's political resources (e.g., support among legislators and executives); the vitality of an organization; the degree of 'open' communication (i.e., networks of communication with free horizontal and vertical communication, and relatively high degree of freedom in communications with persons outside the organization) within an organization; and the agency's formal and informal linkages with the 'policy making' or 'policy enforcing' body (p. 471).

## Environmental Conditions

Policy implementation can be viewed as an interactive process in which the demands and supports from the organization's immediate and general environment play a significant role in defining the organizational context in which the policy is to be implemented. These environmental factors also can shape the direction and form that the implementation process will take and the consequent policy outcomes. For example, economic factors such as the needs and resources of the local implementing agency may determine the priority given to various dimensions of the policy, resulting in its acceptance, adaptation, or rejection. Political factors such as support or opposition to the policy among stakeholder groups can influence implementation efforts and results. Van Horn and Van Meter (1975) identified five kinds of questions that might be asked in determining the effect political, social, and economic conditions may have on the environment:

> Are economic resources available within the implementing jurisdiction (or organization) sufficient to support successful implementation?
>
> To what extent (and how) will prevailing economic and social conditions be affected by the implementation of the policy in question?
>
> What is the nature of public opinion; how salient is the related policy issue?
>
> Do elites favor or oppose implementation of the policy?
>
> To what extent are private interest groups mobilized in support or opposition to the policy? (p.472).

Attention to environmental factors illustrates the dynamic nature of the implementation process. Those factors that influenced the development and adoption of a policy may be of little consequence once the policy has been implemented for a period of time.

## Guidelines for Ministries of Education in the Implementation of Policies

Fullan (1982, pp.251-256) identified five major guidelines for Provincial Departments of Education to consider when attempting to enhance the implementation and continuation of a program or policy in practice. The following is an overview of those guidelines.

The first guideline identified by Fullan (1982) deals with government understanding the difference between compliance and capacity. He made the recommendation that " governments should concentrate on helping to improve the capacity of other agencies to implement change" (p.252). Elmore (1980) made the observation that "[t]here is a critical difference between the ability or willingness of implementers to comply with rules and their capacity to deliver a service. Implementation depends more on capacity than it does on compliance" (p.37). Fullan (1982) argued that while governments are legally responsible for ensuring compliance with policies, they must also direct attention to the capacity of local agencies to implement those policies; by delimiting themselves to a regulatory or surveillance role they may be impeding rather than facilitating implementation (p.251). Fullan (1982) explained:

> because the levels and parts of educational systems are 'loosely coupled,' and because program change is not simple to assess, it requires tremendous energy to find out what is happening; the more preoccupied governments become with surveillance in such a situation, the more energy must be spent at all levels on administrative paperwork, reporting, and other compliance-type information. (p.251)

He added that a preoccupation with compliance diverts attention away from developing the local capacity to make improvements and from providing support and guidance for further development.

The second guideline was related to relationships and expectations. Fullan (1982) stated, "government must be clear about what the policy is and should spend time interacting with local agencies about the meaning, expectations, and needs in relation to local implementation" (p.252). Williams (1976) suggested that effective implementation depends on the the clarity and specificity of program guidelines and expectations, as well as on the capability of the people taking part in the implementation process (p.276). Detailed instructions and a firm guiding hand may be what is really needed; local implementers should also have the opportunity to seek clarification and assistance during the implementation process. Fullan (1982) saw this interactive process as an opportunity for government personnel to keep in touch with the problems and realities of the implementing process, and to make the appropriate adjustments to the program or policy along the way (p.253).

The third guideline focused on resources for program development and technical assistance. Fullan (1982) suggested that "for any new policy, governments should see to it that they or someone else is addressing and looking at the program development and in-service assistance needs" (p.253). Fullan (1982) indicated that when governments have had an impact on changes in educational practice they have done so by providing quality programs and resources together with corresponding resources to support in-service assistance during implementation (p.253).

The fourth guideline dealt with the preparation of government staff. Fullan (1982) recommended,

> Whether central or regional staff are being considered, government agency leaders should take special steps to ensure that their own staff, especially those who have the most direct contact with the field, have the opportunity to develop knowledge and competence regarding the policy and program, as well as in how to facilitate implementation (competence in the content of the change and in the change process respectively). (p.254)

In his final guideline for departments of education, Fullan (1980, p.254) recommended the development of an explicit implementation plan to guide the process of bringing about change in practice. Fullan paraphrased Williams (1980, p.101) when he stated:

> top leaders must really want better implementation to the point of continually asking staff and local personnel about implementation, committing resources to support implementation, and being realistic but insistent about progress.

Fullan (1982, p.254) briefly made reference to a few writers who have provided recommendations or guidelines on how to carry out implementation planning and analysis. Elmore (1980, p.3) commented on backward mapping and reasoning through potential implementation problems before policy decisions are made. He suggested that "instead of beginning at the top of the system with a new policy and reasoning through a series of actions required to implement it, begin at the bottom of the system, with the most concrete set of actions, and reason backward to the policy" (p.29). Bardach (1977, pp.264-266) and Levin (1981, p.68) stressed the importance of strong leaders who take an active interest in probing and "fixing" implementation problems. These people are characterized as task-oriented, instrumental leaders who guide implementers in the right direction, determining where to go and how to proceed. According to this view, "leaders" must have the power to intervene and must be willing to take time out to work through adjustments along the way.

Fullan (1982) concluded his guidelines for implementation with a list of critical supporting elements that are necessary once implementation is underway:

> Balancing the relative emphasis on compliance and capacity; setting up information-gathering procedures which are most likely to influence local action; fostering interaction between local personnel and government staff and others external to the local district; promoting program development and technical assistance resources; and enhancing the capabilities of in-house

> staff to work effectively among themselves and with local and regional agencies. (p.255)

Finally, Fullan cautions Departments of Education to remain cognizant of the practical limitations of their direct control over what occurs in practice.

## Summary

This chapter provides the theoretical foundations for the planning and analysis of the implementation of public policy. It is evident from a review of the current literature that the key to successful implementation is first the formulation of a policy that meets the needs and values of the implementing organization, and second, the adoption of a policy that is flexible enough to endure the successive levels of implementation, yet still maintains the essential intent of the original policy. Implicit in this whole process is the need to build into the implementation process the opportunity to adapt the policy to the contextual needs and values of the implementation site. The central problem of implementation is not conformity to the prescribed policy but, rather to engender consensus in and commitment to the goals and purpose of the policy on the part of those who must carry it out.

# Chapter 3

# RESEARCH METHODOLOGY

The purpose of this chapter is to describe the research orientation and design adopted for investigating the processes and strategies involved in the implementation of a policy initiative. The intent of the study was to make explicit the details of the process and to develop an understanding of the various factors that had an impact on the implementation of the policy. To achieve this objective, a case study approach was adopted and data were collected through interviews, participant observation, and a review of primary and secondary source documents. In the various sections of this chapter the general research strategy adopted, the case study methodology, as well as methods of data collection and data analysis used in the study are described. Finally, concerns for the trustworthiness of the research and for adherence to ethical guidelines are discussed.

## Preliminary Investigation

Data collection began in January, 1987 with a number of preliminary investigations to ascertain the feasibility of the proposed procedures as well as to sensitize the researcher to the field in order to gain an understanding of the present status of the CALM curriculum, the general reaction to the proposed curriculum, and to gain access to key events as well as to establish contacts with potential informants. A number of specific activities were undertaken in this preliminary investigation phase. The investigation began with an interview with Lloyd Symyrozum, Director of Curriculum for Alberta Education, regarding the implementation of *Secondary Education in Alberta* policy initiatives and the feasibility of studying the implementation of one of the initiatives. Given the nature of study which the researcher wished to conduct, the development and implementation of the Career and

Life Management curriculum seemed to hold potential for a case study of implementation. In addition, this promised to be of interest to Alberta Education because it was to be the first policy initiative to be implemented from the *Secondary Education in Alberta* policy statement. Symyrozum subsequently arranged for the researcher to have an interview with those directly responsible for the implementation of CALM.

The second phase of the preliminary investigation involved an interview and discussion with Garry Popowich, the Associate Director of Curriculum for Alberta Education, and with Sharon Prather, the CALM Program Manager. At this session the interviewees discussed the present and future status of the CALM curriculum, as well as the proposed implementation. After these individuals had reviewed the research proposal, the researcher was granted access to Alberta Education working documents and was invited to attend Alberta Education meetings related to CALM. As a means of becoming familiar with the CALM implementation process, it was agreed that the researcher would attend the Alberta Education information-orientation sessions for school system and school administrators, and would analyze the issues and concerns that were expressed by the participants at these sessions. In addition, the researcher agreed to provide a report of a review of the literature on effective implementation strategies. This phase of the preliminary investigation assisted the researcher in gaining access to implementation events as they occurred, and in establishing a working relationship with the CALM implementation team.

## Pilot Study

After the completion of the preliminary investigation a pilot study was conducted with members of the CALM Steering Committee. The pilot study was designed with essentially three purposes. First, it was designed to give the researcher experience in conducting semi-structured interviews, and to provide experience in the analysis of data collected using this technique. Second, the pilot study provided the researcher with the opportunity to become sensitized to the field, and to begin to identify key informants and significant factors that have influenced the implementation process. Finally, through interviews with individuals intimately involved in the implementation process (CALM Steering Committee members), the researcher was able to sharpen the focus of the study, to modify research questions, and to validate the interview guide used in the pilot study. The outcomes of the pilot study assisted the researcher in making the decision that a case study strategy would be most suitable for the purpose of the investigation and that interviews, participant observation, and document analysis would be the most appropriate data collection techniques.

### Investigation into the Genesis of CALM

As a result of the pilot study and the researcher's attendance at two Alberta Education CALM information-orientation sessions, it became apparent that the issue of the origin of CALM was of interest and concern to potential curriculum implementors (administrators and teachers). Because CALM was the result of a policy initiative articulated in the *Secondary Education in Alberta Policy, 1985* the researcher undertook an investigation into the background to, and formulation of, this policy and the consequent CALM curriculum. The purpose of this investigation was to obtain an understanding of the historical context in which the CALM implementation process was embedded and of how this context might influence the perceptions and actions of those currently involved in the implementation of CALM. Carr and Kemmis (1986) suggested that inquiry into the preconditions that make certain interpretations of reality available helps to reveal the historical and social causes of action (p.95). Thus, in order to investigate what prompts people to act in certain ways it is necessary to reveal "how certain kinds of social structures constrain particular social groups in a way that limits the range of actions open to them" (Carr & Kemmis, 1986, p.95). To facilitate this portion of the investigation, primary and secondary source documents from the files of Alberta Education and the study entitled *The Formulation of the Alberta Secondary Education Policy, 1985* [1] (Bosetti,1986) were reviewed. In addition, interviews were conducted with individuals involved in the formulation of the CALM curriculum, and with the former Associate Director of Curriculum for Alberta Education who was instrumental in developing the Elementary and Junior High School Health curriculum as well as a proposed Senior High Health curriculum. The purpose of these interviews was to ascertain various perceptions regarding the genesis of CALM, and factors which the actors deemed significant in influencing its development and implementation.

## Case Study Design

The case study approach was adopted because it "emphasizes the total situation or combination of factors, the description of the process or sequence of events in which behavior occurs" (Gee,1950, p.230). Yin (1984) suggested that case studies are the preferred strategy when"how to" or "why" questions are being posed, when the investigator has little control over events, and when the focus is on a contemporary phenomenon within some real-life context" (p.13). In a discussion of policy implementation, Williams (1980) stated that "[t]he most useful studies generally have been factually dense with lots of information about what people actually did in trying to make a programmatic decision operational. Case studies have been critical" (p.11). He went on to suggest that what is needed in the study of policy implementation is a detailed investigation of what happened in the field and a description and explanation of the interplay among the political, technical, bureaucratic, and socio-economic factors that impinged on the efforts to put a decision into place. Rist (1982) reinforced this position when he made the statement that educational researchers have come to the conclusion that "it is dangerous politically and intellectually to rely on outcome measures while one is left to guess at the process" (p.440). Furthermore, historical treatment of the setting and genesis of a policy initiative is important in enhancing understanding of the contemporary scene. Bogdan and Biklen (1982) explained that the use of "data sources such as interviews with people who have been associated with the organization, observations of the present [context or setting], and existing written records" (p.59), are useful methods for investigating the historical context of a case study. In essence, then, the case study approach has the potential to yield a more or less continuous picture through time of the experiences, social forces, and influences to which the implementation process has been subjected.

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[1] This study was the researcher's Master of Education thesis. The study in effect formed the basis for the first phase of her research into the processes involved in the formulation and implementation of public policy. The second phase of her research focused on the process involved in the implementation of one of the *Secondary Education in Alberta* policy initiatives, namely, the Career and Life Management Curriculum.

The case study approach has its inherent strengths and weaknesses. Macdonald and Walker (1974) made the point that case studies are always partial accounts "involving selection at every stage, from choosing cases for study to sampling events and instances, and to editing and presenting material" (p.4). They went on to list a number of problems that a researcher using the case study approach might encounter. These problems included the researcher

> becoming too involved in the issues, events, or situations under study; problems over confidentiality of data; problems stemming from competition from different interest groups for access to and control over the data; problems concerning publication, such as the need to preserve anonymity of subjects; problems arising from the audience being unable to distinguish data from the researcher's interpretation of the data. (p.4)

The researcher, however, can take into account many of these potentially problematic areas by carefully structuring the research design and taking the appropriate steps to ensure the trustworthiness of the research findings.

In the view of Yin (1984), the case study does have inherent strengths and is particularly useful when conducting an inquiry that

> investigates a contemporary phenomenon within its real-life context; when the boundaries between phenomenon and context are not clearly evident, and in which multiple sources of evidence are used. ( p.23)

Kimball Young (cited in Gee, 1950), succinctly summarized the advantages of using the case study approach:

> [First], the case study gives a more or less continuous picture through time of the individual's interpretation of his own experience and often that of others...the nature of social reality is revealed only when we know the meaning which people put upon their experiences. [Second], the case study furnishes a picture of past situations which gave rise to new meanings and new responses...[Third], repetitions of situations, meanings, and responses may be noted and used for comparative purposes in forming generalizations...and finally, by the use of the case-study method inferences and generalizations are based upon an intimate knowledge of the situation and the habits and attitudes of the persons interacting. (pp. 246-248)

Thus, for the investigation of the processes involved in the implementation of a policy initiative, the researcher deemed that a case study strategy would permit a detailed examination into how the actors involved in the implementation process make sense of their experience and involvement in the process.

Gergen (1968) suggested that policy processes are historically bound, and that it is almost impossible to freeze the process at any one point and still gain an adequate understanding. Dunn (1981) supported this argument when he stated:

> In reality policy problems are not independent entities, they are parts of whole systems of problems best described as messes, that is, systems of external conditions that produce dissatisfaction among different segments of the community. (p.99)

Consequently, an adequate analysis of a policy process requires a holistic approach. Policy problems have no existence apart from the individuals and groups who define them (Dunn, 1981, p.99), and the perception of these problems are further influenced by the ideologies and social structures in which the actors are embedded.

## Data Collection

In keeping with a case study strategy, which permits both the holistic treatment of complex realities as well as depth of insight, the study was conducted using primarily qualitative research methodology. According to Filstead (1970)

> Qualitative methodology refers to those research strategies, such as participant observation, in-depth interviewing, total participation in the activity being investigated, field work etc., which allow the researcher to obtain first-hand knowledge about the empirical social world in question. Qualitative methodology allows the researcher to 'get close to the data,' thereby developing the analytical, conceptual, and categorical components of explanation from the data itself. (p.6)

The main attribute of qualitative research is that the natural setting is the direct source of data and the researcher is the key instrument in describing and observing events, or in interviewing actors to determine how they interpret or ascribe meaning and significance to events under observation or consideration (Bogdan & Biklen, 1982, p.27).

Adopting qualitative research methodology for the study, data collection and analysis involved essentially three research activities: in- depth interviewing of selected participants involved in the successive levels of the implementation of the Career and Life Management (CALM) curriculum; participant observation at CALM Steering Committee meetings, Alberta Education CALM information-orientation sessions, and various CALM related workshops and conferences; and the analysis of CALM Project Team and CALM Steering Committee working documents, proposals and reports, as well as various other government documents related to the genesis of the CALM curriculum.

**Interviews**

Transcripts of interviews constituted a significant portion of the data collected in the study. Both semi-structured and unstructured interviews were used essentially for three purposes: 1) to identify perspectives of actors involved in the successive levels of the implementation of the CALM curriculum with regard to significant events, issues and concerns, process and strategies that influenced the shape and direction of the genesis, adoption and implementation of CALM; 2) to locate relevant sources of data and to confirm and enhance the interpretation of documents, proposals and reports; 3) to provide attitudinal data not recorded in documents. Interviews were deemed to be a significant source of data because the decisions and strategies employed in the implementation of the CALM curriculum were developed and interpreted by various actors involved in the process. Consequently, it was necessary to assess how their perceptions and values influenced the implementation process and outcomes. Van Horn and Van Meter (1975) emphasized this point when they stated that

> [t]he implementor's understanding of the general intent, as well as the specific standards and objectives of the policy, is important...We want to emphasize that implementors may screen out a clear message when the decision seems to contradict deeply cherished beliefs....
>
> The direction of implementor's dispositions toward the standards and objectives is crucial also. Implementors may fail to execute policies faithfully because they reject the goals contained in them. (p. 472)

Accordingly, interviews were conducted with the essential purpose of determining what was in and on the actor's mind. The researcher attempted to enter into the actors' perspective to access their feelings, thoughts and intentions, without imposing any preconceived categories for organizing and interpreting the world. In brief, interviews permitted the researcher to access information and insight that could not be obtained through observation or review of documents.

### Interview Method

Unstructured interviews were conducted during the initial stages of data collection when the researcher was attempting to develop a more precise focus for conducting the proposed study. In the initial stages, the study was guided by a number of general research questions. These questions served as the basis for interviews with the Director and Associate Director of Curriculum for Alberta Education and the Program Manger for CALM to determine their definition of the present status of the CALM curriculum and the direction in which they would like to see it develop; their interpretation of significant issues and concerns that were perceived to influence the implementation process; and finally, their identification of individuals and groups that could provide further insights into the implementation process. In general, the data collection began with unstructured interviews and progressed to semi-structured interviews as the investigation became more focused, as research questions were sharpened, and as themes began to emerge.

The semi-structured interviews were conducted using an interview guide as a starting point, with provisions for the researcher to probe more deeply using general probing questions (see Appendix G). This approach was especially important in the later stages of data collection when the researcher attempted to identify the themes that had emerged in earlier interviews, but still required further exploration in order to clarify and enhance understanding. Patton (1980) explained the advantage of using semi-structure interviews was that:

> [t]he interviewer remains free to build conversation within a particular subject area, to word questions spontaneously and to establish a comfortable style but with the focus and particular subject that has been predetermined. (p.200)

This method provides "a desirable combination of objectivity and depth and often permits gathering valuable data that could not be obtained successfully by any other approach" (Borg & Gall, 1983, p.441).

The interview guide consisted of a number of specific yet open-ended questions that were approved by a panel of individuals familiar with the policy process (members of the CALM Steering Committee, and the CALM Project Team). Through a pilot study these people were interviewed and responded to questions in terms of relevance of the content for the purpose of the study and the policy, as well as for clarity in the wording and meaning of the questions. As a result of the pilot study the researcher was able to identify significant issues and concerns related to the development and implementation of CALM, which shaped the focus of the study.

### Interview Procedure

Thirty-eight formal interviews were conducted during the period from February, 1987 to October, 1988, with participants who were representative of individuals involved in the successive levels in the implementation of the CALM curriculum (see Appendix F). The interviewees consisted of seven CALM Steering Committee members, two members of the Alberta Education CALM Implementation Team, two CALM curriculum supervisors and a curriculum consultant from large urban school boards, two superintendents, seven principals and twelve teachers from both urban and rural boards, as well as representatives from Alberta Education Regional Offices and other government agencies who were involved in the development and/or implementation of the CALM curriculum. On an informal basis, interviews were conducted with a class of CALM students at an urban and rural high school. Parents, teachers and administrators were also interviewed on an informal basis at the conferences, workshops, and information sessions that the researcher attended.

Two techniques were adopted for the purpose of identifying and selecting interviewees: snowball sampling and purposeful sampling. Snowball sampling is a technique used when an interviewer asks the first person interviewed to recommend others. Bogdan and Biklen (1982, p.66-67) recommended that once the first few selected individuals have been interviewed, and themes have begun to emerge from the interview data, it is important to provide examples of negative cases which can bring new perspectives and insights to the evolving themes or theory which have been grounded in the data. This is where the second technique, purposeful sampling, was used. Baily (1982) described purposeful sampling as the strategy in which "the researcher uses his or her own judgement about which respondents to choose, and picks only those who best meet the purposes of the study" (p.99). This technique was also of assistance when it was necessary to use informants to clarify or to bridge a gap in the research data. In other words, it was sometimes necessary to seek out interviewees who possesses certain kinds of expert information, or had knowledge or experience in certain areas.

The interviewees were all contacted by telephone, and the purpose of study was explained to them. The researcher requested verbal consent at this point to tape record the interview session with provisions made to turn off the tape recorder for "off the record" comments. Depending on the interviewee's position and responsibility in the implementation process anonymity was assured. For example, it was impossible to ensure anonymity to individuals who held recognizable positions such as the CALM Program Manager, or to those individuals who were the only representative in a sample (i.e., the only superintendent). However, if the interviewee was identified and directly quoted, he or she was given the opportunity to view that portion of the report to verify that the researcher had accurately conveyed the intended meaning. Finally, all formal interviews were tape recorded and then transcribed verbatim for later analysis.

### Document Analysis

Both primary and secondary source documents were used in the study with the main objective of constructing a chronology of the events that took place in the transformation of the policy initiative (development and implementation of the CALM curriculum) into action (see Appendices A and C). The chronology served as an organizing framework for the analysis of the process. Documents were also used to clarify, elaborate and validate data collected through interviews and in some cases they helped to identify questions or areas for further exploration. Appendix A provides an outline in chronological order of all of the documents used in the study.

Primary source documents such as correspondence, reports, memoranda, briefs, new releases, and other relevant documents were obtained with permission from the files of Alberta Education, and from other major stakeholder groups involved in the formulation and/or implementation of CALM. Kerlinger (1973) made the distinction between primary and secondary source documents:

> A primary source document is the original repository of an historical datum, like an original record kept of an important occasion, an eyewitness description of an event, a photograph, minutes of organizational meetings...A secondary source is an account or record of an historical event or circumstance once or more steps removed from an original repository. (p.702)

Because the investigation was undertaken at the same time the policy initiative was being implemented there were few official documents related to the strategies and techniques involved in the implementation process. Most of the documents were "working documents"; that is, they were proposals, agenda for meetings, recommendations, and initial reports. Interviews and participant observation at a number of the events from which the documents were gathered or produced assisted in the clarification of their purpose and intent, and yielded additional information in cases where the proposals came to fruition.

### Participant Observation

Bogdan and Biklen (1982) explained that participant observation is a technique employed in the collection of qualitative research data where the researcher

> enters the world of the people he or she plans to study, gets to know, be known and trusted by them, and systematically keeps a detailed written record of what is heard and observed. This material is supplemented by other data such as school memos and records, newspaper articles, and photographs. (p.2)

In this study the researcher was invited by the Associate Director of Curriculum for Alberta Education and the CALM Project Manager to attend any relevant Alberta Education, CALM related meetings, workshops or conferences that were available in the researcher's established time framework. During the months of May and June, 1987, the researcher was able to attend three CALM Steering Committee meetings that dealt with the. development of the CALM curriculum and issues or concern related to course implementation. In addition, the researcher attended information-orientation sessions for school system and school administrators in Edmonton and Calgary (June, 1987), as well as an Alberta Education Custom Publishing Conference (it had been decided that a custom published text would be developed for the CALM curriculum) held in May, 1987. The Alberta Catholic School Trustees' Association extended an invitation to the researcher to attend their CALM implementation conference (February, 1988), and finally the researcher chaired a number of CALM related sessions that were conducted at the Phi Delta Kappa Conference entitled "Students at Risk" (October,1988). The CALM related sessions involved a guest speaker (i.e., CALM teacher-coordinator, CALM curriculum supervisor, Community resource person) who spoke on topics related to the implementation of CALM and then engaged in a question and answer period with the audience. In one session the guest speaker brought along a panel comprising of parents, students, and teachers who shared with the group their views regarding the benefit of the CALM curriculum for students, and how it has affected their lives. At these conferences, workshops and meetings the researcher kept detailed notes of the event's proceedings, conducted informal interviews and had discussions with many of the participants. Attendance at these meetings provided the researcher with the opportunity to make contacts with administrators and teachers involved in the implementation of CALM throughout Alberta.

## Data Analysis Procedure

Data analysis is essentially the process of "interpreting and making sense out of the collected materials" (Bogdan & Biklen, 1982, p.145). Bogdan and Biklen (1982) succinctly explained the data analysis procedures most appropriate for the qualitative research techniques adopted in this study:

> Data analysis is the process of systematically searching and arranging the interview transcripts, fieldnotes, and other materials that you accumulate to increase your own understanding of them and to enable you to present what you have discovered to others. Analysis involves the working with data, organizing it, breaking it into manageable units, synthesizing it, searching for patterns, discovering what is important and what is to be learned, and deciding what you will tell others. (p.145)

In this study the process of data collection and data analysis occurred concurrently. After each interview was conducted and each workshop or meeting was attended the researcher would record in a journal her ideas, reactions, reflections, understandings and interpretations of the event or experience. Through this process the researcher engaged in a kind of reflective analysis of the data and the identification of potential themes, questions, and theories. Interviews were transcribed as soon as possible after they were conducted, and researcher's comments and reflections were incorporated into the transcripts for easy reference during the analysis phase. While general research questions guided the initial collection and analysis of data, the understanding and interpretations made of the early analysis of data served to inform and direct later data collection. As data were collected and analyzed, questions that required further clarification and validation began to emerge. Consequently, the guiding research questions became more refined, and the progressive identification of the gaps in the researcher's understanding were used to indicate the need for and direction of further data collection. Hence, the outcome was a study which began with an examination of the processes involved in the implementation of a policy initiative (the structural dimension of the study), and then moved toward a focus on the techniques, strategies and perceptions of actors involved in the management of the implementation process (the management of change). The direction and focus of the study was shaped by the predominant themes that emerged from the interviews and preliminary investigations.

Skirtic (1985) described in detail the methods that his research team used in categorizing and unitizing research data. A similar procedure was adopted for the categorization and analysis of data in this study:

> Essentially, the categorization process involves sorting the [subject] unit cards into groupings of like content and devising a rule to describe the nature of the content to be included in each one. That is, the tacit knowledge we used to judge the cards as look-alikes was translated into the propositional language of a rule for classification. As the categorization process continued, a number of cards could be placed in more than one category. This is because they contained content that was related logically to the content of established categories. These cards were duplicated in sufficient number, noted as cross-reference cards, and placed in all appropriate categories. (p.195)

Similarly, in this study the organization and unitization of data began with the researcher systematically reviewing each interview transcript paragraph by paragraph with the intent of labelling all of the phenomena that she perceived to be of potential relevance to the study. Each label (unit) was written on 5 x 8 index cards. For reference purposes the name of the interviewee and the page number in the transcript where the unit was located was included. Enough labels were generated to adequately account for the phenomena described in each paragraph. The criterion for labelling units was to use a word or phrase which would describe the essence of the data as closely as possible. In some instances direct quotes of significant passages in the transcript were included. After the completion of each transcript, the researcher reviewed all of the index cards and then segregated them into groups based on logical relationships among unit labels. A category or title was then generated that once again described as closely as possible the essence of the group of units. The index cards were then filed alphabetically according to the category or title. As the cards were filed, they were numbered; for example, if the category was "Teacher Selection" then all of the units filed under this category would be numbered TS1, TS2, TS3, and so forth.

The second phase in the categorization and consequent analysis of data involved further condensation of categories and the identification of themes and questions. First, all of the categories and their sub-categories were entered into a computer and a table of contents was generated. This provided the researcher with an outline of all of the categories. The researcher then reviewed all of the categories for relationships with the intent of further condensing them into more specific categories. This involved two processes. Once a potential new category or revised category was identified the researcher attempted to bring together enough examples (unit index cards) to define the category so that it became clear what future instances would be included in that category. Secondly, as the researcher compiled examples to fit into the new or revised category she began to formulate a criteria for putting further instances into that category (Turner, 1981, p.231). Using a computer program the condensed categories were once again indexed alphabetically. For the purposes of cross-referencing, the new title or category was entered in bold capital letters. Directly under the title was a list of all of the index cards that pertained to this category. Finally, the essence of the index cards that were listed were summarized in point form under sub-headings. For example:

> **CONCERNS: CALM STEERING COMMITTEE**
> Card Number: C10, C11, C19
> **•INFRASTRUCTURE**
> -need manpower to conduct workshops to supplement ACCESS video inservice tapes (Goodman, p.8).
> **•STRESS**
> -Administrators are working hard to overcome effects of budget cuts (Ditchburn, p.2).

At the end of each category the researcher included observer comments based on her field notes and journal entries, as well as questions or thoughts that might be useful in later analysis. Based on this process questions and themes emerged, and the shape of the research document began to take form.

The data were subjected to a final phase of data analysis. This phase began with a review of the literature on effective implementation strategies. After the researcher had developed focused sets of themes, she went back to the literature to identify ways of expanding and clarifying some of them. The literature was essentially used as a source for identifying questions and comparing themes. There was no attempt to use the literature as statements or measures of truth. In a study of this nature it is futile to search for single truths. As discussed earlier, the researcher had adopted the assumption that many aspects of social reality are subjectively constructed in the minds of the participants, thus social environments are assumed to contain multiple, intangible realities. The purpose of this study was to attempt to come to an understanding of the meanings that a number of actors involved in the implementation of the CALM curriculum had attached to that process. Based on a review of the literature and the themes and categories that the researcher had already identified, it was decided that the best way to communicate the findings of the study was to organize the second round of categorized data into the various phases involved in the implementation of the CALM curriculum. Computer print-outs of the various categories were appropriately segregated into separate folders labelled "Genesis of CALM," "Awareness and Acceptance of CALM," and "Implementation of CALM." Finally, yellow tabs with one word labels were attached to the data for easy reference during the analysis and writing of the research report. These data then became the basis for the various chapters in this thesis.

## Trustworthiness

The fundamental objective of a research report is to make sense of the data that have been collected and to convey them to an audience in a credible manner. When using qualitative research strategies or techniques the purpose is to present a valid interpretation of the world as perceived by its inhabitants. Patton (1980, p.327) argued that the perspective gained through qualitative research is not arbitrary or predetermined. When researchers employ qualitative methods to collect and analyze data, they must then present the findings in a manner that convinces a critical community of fellow scientists that the results are valid (Carr & Kemmis, 1986, p.91), and at the same time the final account must be able to pass the test of participant confirmation. Carr and Kemmis (1986) stated that "it is only when the theorist and those whose actions he observes come to agreement that a theoretical interpretation of those actions is 'correct' that the theory can have any validity" (p.92).

Lincoln and Guba (1985, p.290) identified four concerns that should be addressed when using qualitative research methods to ensure that the research findings are trustworthy. These concerns include truth value (credible), applicability (transferable), consistency (auditable), and neutrality (confirmable). The question of truth value asks, "How can one establish confidence in the 'truth' of the findings of a particular inquiry for the subjects with which-and the context within which-the inquiry was carried out?" (Guba & Lincoln, 1981, p.103). To ensure credibility, Lincoln and Guba (1985) suggested prolonged engagement at the site, persistent observation, triangulation, peer debriefing and member checks.

The question of applicability asks, "How can one determine the degree to which the findings of a particular inquiry may have applicability in other contexts with other subjects?" (Guba & Lincoln, 1981, p.103). To ensure transferability Lincoln and Guba (1985, p.201) recommended purposive or theoretical sampling to maximize the range of information that is uncovered. Pansegrau (1983) explained that the

> nature of the sampling process is governed by emerging insights about what is relevant and important, and 'thick' description (Geertz, 1973) is collected which permits judgements to be made concerning the fit between this and other contexts (p.81).

The question of consistency asks, "How can one determine whether the findings of the inquiry would be consistently repeated if the inquiry were replicated with the same (or similar) subjects in the same (or similar) context?" (Guba & Lincoln, 1981, p.104). To ensure consistency the researcher should establish an audit trail that explains in detail the process the researcher used to collect and analyze the data. Halpern (cited in Lincoln & Guba, 1985, p.319) identified six audit trail categories that should be used when constructing an audit trail: raw data; data reduction and analysis products; data reconstruction and synthesis products; process notes; materials relating to intentions and dispositions; and finally, instrument development information.

The final question posed by Guba and Lincoln (1981, p.104) dealt with the concept of neutrality or confirmability. They asked, "How can one establish the degree to which the findings of an inquiry are a function solely of the subjects and conditions of the inquiry and not of the biases, motives, interests, perspectives, and so on of the inquirer?" Lincoln and Guba (1985, p.319) suggested that the major technique for ensuring confirmability is once again the audit trail. The other two techniques which are integrated in the audit trail approach are the keeping of a reflective journal and triangulation (the collection of data from a variety of sources using a variety of methods).

In addressing the four concerns described by Lincoln and Guba (1985) the researcher utilized a combination of member checks, triangulation, purposive sampling, a reflective journal and an audit trail to ensure the credibility of the research procedures and findings. The process of data triangulation was adopted to cross check different data sources ( documents, observations and perceptions of interviewees) against one another to determine consistency in perceptions and interpretations of experience or events. The process of triangulation was built into the interviews conducted for the study. Interviewees were often asked to verify or assess the validity of a statement made by previous interviewees, or to comment on a concept or event described in a document. When appropriate, the interviewees were asked if there were any documents available that could support statements. This was especially important in researching the genesis of the CALM curriculum.

Member checks was another method used to verify the credibility and accuracy of the data. When conducting interviews the researcher would often rephrase what the interviewee had communicated to ensure that the researcher was interpreting the message as the interviewee had intended. Secondly, data and interpretations were continuously tested with members of various groups from which the data were solicited. For example, members of the CALM Steering Committee were asked to share with the researcher their understanding regarding the origin of CALM. If their understanding differed significantly from other Committee members they were asked to comment on these differences.

Purposive sampling was used in an attempt to obtain a better understanding of the processes involved in the implementation of the CALM curriculum. For example, when interviewing school administrators regarding their decision as to when to become involved in the implementation of the CALM curriculum it was important to interview administrators who were supportive of the curriculum and those who had not yet committed themselves to its implementation. As well, it was at times necessary to seek specific people who could provide certain kinds of expert information. Such was the case in determining the genesis of the CALM curriculum.

In an attempt to ensure an acceptable degree of neutrality in the interpretation of the data, the researcher kept a reflective journal. The purpose of the journal was to record her personal thoughts or feelings regarding an interview she had just conducted, an event she had observed, or an article she had read. The journal was useful during the data analysis phase because it helped the researcher to more accurately recall the details (context, feelings) of the situation in which the data were solicited or observed. As well, the researcher asked three members in the Department of Educational Administration at the University of Alberta who were familiar with the study and knowledgeable regarding the character and disposition of the researcher to assess the findings of the study for investigator bias.

Finally, in addressing the concern for the auditability of the research procedures and findings, the researcher constructed an audit trail. This trail included a reflective journal, tape recordings and verbatim transcripts of all formal interviews, all of her notes (file cards, computer print outs, indexes, field notes) used in the categorization and consequent reduction of data. Finally, the data reconstruction and synthesis products were also kept in the file folders used to organize the various chapters in the study.

### Ethical Guidelines

This study involved the use of human participants as one of the sources of data. Actors involved in the successive levels of the implementation of the Career and Life Management curriculum were interviewed with regard to their involvement in and their perception, of the implementation process. Because some of the actors interviewed held key, readily identifiable positions in the administration of the implementation process, it was not always possible to assure anonymity. Therefore, the researcher took the necessary steps to ensure that the respondent was fully informed with regard to the purpose of the study and the purpose of the interview, and that their responses would be treated with confidentiality. In most cases this was carried out through a telephone conversation. In the case of Edmonton Public and the Calgary Board of Education a letter of access was submitted to Board's research liaison office explaining the purpose and intent of the study, and in some cases this letter was then forwarded to the teacher or administrator that the researcher had obtained permission to interview (see Appendix H). With regard to confidentiality, if the respondent was directly quoted and specifically identified, he or she was given the opportunity to react to, and confirm that the researcher's interpretation of the information obtained through the interview was accurate and permissible to be used in the dissertation. Finally, the researcher ensured that the information presented in the final document would not embarrass or harm the respondent in any way; that is, "off the record" comments were not used in the study, and whenever possible anonymity of an informant was maintained.

## Summary

The review of the research strategy adopted for the study indicates that the investigation was conducted using various methods for collecting data from a variety of sources. The study ranges from being relatively focused and structured -- as in the analysis of the genesis of the policy initiative -- to being more unstructured and exploratory regarding participants' perspectives of the process of implementing the CALM curriculum. The first part of the study tended to be historically based, in that documents were more readily available and that the events in question had already occurred. However, the heart of the study rested in the ongoing process of the implementation of a particular policy; that aspect of the study required a more emergent design.

# Chapter 4

# GENESIS OF THE CAREER AND LIFE MANAGEMENT CURRICULUM

The purpose of this chapter is to describe and explain the processes associated with the genesis of the CALM curriculum. First the broad context in which CALM was developed is defined through a review of policy documents, progress reports, and philosophical statements obtained from the files of Alberta Education. In the second section of this chapter is presented a description of how a federal initiative to improve the well-being of Canadians led to a provincial initiative, and was finally made manifest in a comprehensive elementary and secondary education health curriculum, in which CALM was initially viewed as a component part. The third section is a synthesis of the opinions and perceptions of those involved in the development of the CALM curriculum, regarding their understanding of Alberta Education's rationale behind the development of a CALM curriculum. The fourth section explains the actual processes involved in putting the Secondary Education policy initiative to develop a CALM-type curriculum into action. Finally, the chapter concludes with a discussion of significant issues and concerns that emerged in response to Alberta Education's decision to develop the CALM curriculum, and to make it a core requirement for the attainment of a high school diploma.

## Philosophical Foundations of CALM

On June 12, 1985 Premier Peter Lougheed and Education Minister David King officially released a policy statement which was intended to set the direction for secondary education programs in Alberta. The policy statement was developed in response to a review of secondary education programs, a survey (Gallup Poll and questionnaire) of the views and needs of the public, an analysis of current trends in education (national and international), and forecasts of the future for Alberta and Canada (*Secondary Education in*

*Alberta*, 1985, p.3). In his address to the Canadian Education Association in September 1984, Premier Lougheed emphasized the need for the evaluation of the educational system. He stated that "if you have a good educational system, the community at large is more able to survive as an entity--to progress and to grow--providing fine opportunities for our young people" (*Secondary Education in Alberta*, 1985, p.3). The policy had its earliest impact on senior high school students in September,1986 when the minimum passing grade was raised from 40 percent to 50 percent, and will have its full impact on students graduating from high school in the 1990s when all of the new senior high diploma requirements together with the new and revised supporting programs will have been implemented.

The philosophical foundations of the policy statement reflect not only the goals and purposes of education in Alberta, but also the economic and social goals of the provincial government. The following quotation articulates the philosophical basis upon which the Government developed its social and economic goals:

> The Government of Alberta bases its actions upon a belief in the rights of the individual within our democratic society. Each Alberta citizen has the right to the opportunity to achieve the highest possible social and economic standards. Along with this right, the individual has a responsibility of contributing, as best as he or she can, to the economic and social well being of our society (*Economic and Social Progress Goals, Progress Report V*, 1977, p.2).

Similarly, the Department of Education reflects this philosophical orientation in its stated commitment to providing educational services in an orderly, efficient, and equitable manner, and in its ultimate aim in education -- developing the abilities of individuals in order that they might fulfill their personal aspirations while making a positive contribution to society (*Goals of Education*, 1978). Specifically, the educational policies attempt to provide "opportunities" for individuals to develop their potential to achieve social and economic success, and at the same time to develop skills and knowledge which will enable them to make positive social and economic contributions to society. These goals and responsibilities are supported in the 1985 *Secondary Education in Alberta* policy document which reinforces such concepts as individuality, nurturing a quest for knowledge, excellence, participation in a democratic society, and assuming responsibility for oneself and for the future direction of society. The following statement reflects this perspective:

> The aim of education is to develop the knowledge, the skills and the positive attitudes of individuals, so that they will be self confident, capable and committed to setting goals, making informed choices and acting in ways that will improve their own lives and the life of their community. (p.7)

There is evident congruence between the provincial Government's economic, social and educational goals. This congruence suggests that the Government perceives the educational system, through defining its educational programs, as significant in assisting Alberta to achieve its economic and social goals.

### Responsibilities of Secondary Education Programs

The 1985 *Secondary Education in Alberta* policy document defines the primary responsibility of secondary education programs as the intellectual development of each student and the fostering of a desire for life-long, self-directed learning. The secondary responsibility is defined as the social and creative development of each student as a shared responsibility with other agents in society (family, church, and community). The policy document also recognizes and addresses the need for students to acquire the practical skills and knowledge for "everyday living" which prepares them to become self-reliant, contributing members of a constantly changing society. To fulfill these responsibilities and goals, the policy document outlines a broadly based general education program that emphasizes "the achievement of basic skills, knowledge and positive attitudes" (*Secondary Education in Alberta*, 1985, p.23). In the fulfillment of the secondary responsibility of junior and senior high programs, and to provide a better balance between cognitive and affective domains of learning, the policy document proposes the development of a new core course referred to as "Career and Life Management." The course is to be practical in nature and directed toward "everyday living" skills. The document states that the new senior high school course will require that students successfully complete a core course with the following central characteristics:

> career, personal finance, and life management skills, including personal development, interpersonal relationships, effective learning skills, career planning skills and attitudes required in the workplace, preventative alcohol and drug education, and other relevant societal issues. ( p.24)

Finally, the new Career and Life Management (CALM) course is of particular significance to secondary education in Alberta for essentially two reasons. First, the course is the first policy initiative to be developed from the *Secondary Education in Alberta* policy document, and second, it is the first new core course to be implemented in Alberta Senior High Schools since 1966 when the grade 10 Physical Education course was introduced.

## Impetus for CALM

The need for a course like CALM was recognized long before the 1984 Secondary Education Review which provided the basis for the *Secondary Education in Alberta* policy document and the subsequent CALM curriculum. The founding basis for CALM can be traced to the Canadian health promotion movement which was initiated in response to a 1974 report from the Minister of the Department of National Health and Welfare. The report was entitled *A New Perspective on Health of Canadians*, and was quickly referred to as the "Lalonde Report," because the Honorable Marc Lalonde then held that portfolio. The report states that the Government of Canada has a legitimate and important role to assume in health promotion: "The Government of Canada now intends to give human biology, the environment and lifestyle as much attention as it has to the financing of health care organizations." The report goes on to explain that in Canada death and disease can be attributed to four main factors: biological factors, environmental hazards, unhealthy lifestyles, and the health care system. Lalonde placed emphasis on the importance of the concept of a health partnership between the government and individual Canadians in the management of the health status of Canadians. He explained:

> The [health] problems cannot be solved solely by providing health services but rather must be attacked by offering the Canadian people protection, information and services through which they will themselves become partners with health professionals in the preservation and enhancement of their vitality.

The Lalonde Report indicated that the Federal Government viewed health promotion and health education to be of critical importance to the management of the Canadian health care system and for the general well being of the public. The problem of getting people to take personal responsibility for their health and to make wise lifestyle choices requires education, information and widespread awareness of the need to take personal action. The Department of National Health and Welfare had a number of avenues of access to educate the public; however, one of the best vehicles that not only ensured a "captive audience," but also guaranteed access to the majority of young people, was through the provincially controlled educational systems. In 1974, as a result of the Federal-Provincial Conference of Deputy Ministers of Health, the Federal-Provincial Advisory Committee on Community Health was assigned the task of providing a report and recommendations on school health education in Canada.

## Setting the Groundwork

During the period of 1974-1977 an ad hoc committee established by Alberta Education studied health education in Alberta. The committee developed a rationale for change in the existing school health program. On the basis of a seminar convened to hear the views and opinions of concerned professionals regarding the need for drug education in schools, a proposed curriculum scope and sequence for health education content was developed (Mann, 1985, p.1). The committee also sponsored a two- day workshop for concerned professionals and people not directly associated with an educational institution to hear their views and opinions with regard to major issues involved in school health curriculum revision and updating (Mann, 1985, p.2).

At the local level school boards, in cooperation with teachers and community services, were already taking the initiative to develop new health materials as well as new health units. A number of large districts had established standing committees on health which resulted in the development of complete curricula such as "Dimensions for Living," prepared by the Lethbridge Public School Board, and "Perspectives for Living," developed by the Edmonton Public School Board. In addition, a number of teacher initiated guidance, health and life skills type programs were being taught in other districts around the province in response to local level needs. Based on the ad hoc committee's findings, as well as the number of locally developed health programs in existence in the province, Alberta Education concluded that there was a need for a comprehensive provincial health curriculum (Mann, 1985, p.2).

In 1976 a conference of Provincial Ministers of Health concluded that a realistic goal for most Canadians would be healthful living. In reference to the Lalonde report, of the four major factors causing death and sickness in our society, lifestyle was the one factor over which people could exercise the most control. This goal was soon to be reflected in the Alberta Health Curriculum.

In response to the report and recommendations prepared by the Federal-Provincial Advisory Committee on Community Health, an Interdepartmental Task Force was convened by Alberta's Ministers of Education, Social Services, and Community Health in 1977. Representatives of the Departments of Education, Social Services and Community Health, Advanced Education and Manpower, Agriculture, Workers' Health, Safety and Compensation, Recreation and Parks, and Transportation comprised the Task Force. The Task Force was given the responsibility of critically assessing the current health education and health related programs in the educational system, to identify the critical health needs of students, and to make recommendations with regard to education and the health needs of students. In November, 1980 the Task Force released a report entitled *Report of the Interdepartmental Task Force on Health Education in Schools.* In this report the Task Force adopted the World Health Organization's definition of health: "health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity" (1980, p.i). One of the most significant recommendations made in the report focused on the role the department could play in addressing the critical health needs of students:

> Because Alberta Education has the mandate to develop and implement curriculum, and because the Task Force has determined that most of the inadequacies and problems in the present situation could be dealt with through development of a new comprehensive health curriculum and support through resources to teachers in the delivery of the resulting health program, a set of recommendations has been made specifically to that department. (p.33)

The report went on to make five recommendations related to a health education program. Essentially, they recommended the development of a mandatory core health education program for grades 1 to 12 that addressed all of the critical health needs as identified by the Task Force (see Appendix B). They also suggested the identification of relevant government and community programs for inclusion as curriculum support resources in the provincial school health curriculum guide (1980, p.iii).

The other significant outcome of the Interdepartmental Task Force report was the identification of the critical health needs of the public. The term "critical" was defined as needs that are of "essential importance" (1980, p.9). In the process of identifying critical health needs the Task Force concentrated on the entire population rather than on just school age children. Their rationale for this approach was that "health problems encountered later in life are rooted in behaviors and practices established during the school years" (1980, p.5). The Task Force identified twelve problems deemed preventable, for the most part, through behaviour and attitudes that could be taught through a school education program (See Appendix B). The report concluded by stating that "good health and its concomitant benefits can be achieved if Alberta children are assisted in developing healthy lifestyles" (1980, p.35). The process of health education and health promotion was deemed especially important because "good health is the bedrock on which social progress is built. A nation of healthy people can do things that make life worthwhile, and as the level of health increases, so does the potential for happiness" (Lalonde Report, 1974). The direction was set for a new approach to the management of health in Alberta, with an integral component being the new health education program that would be "an ongoing process designed to motivate and assist students to develop knowledge, attitudes and behaviors to ensure physical, mental and social well-being" (Mann, 1985, p.5).

In summary, the Federal Government report *A New Perspective on Health of Canadians* , initiated a national awareness of the need to improve the health status of Canadians and marked the beginning of a partnership between Government and individual Canadians in the area of health promotion. The concept of partnership seemed to imply that the Government would work toward educating the public with regard to improving and taking responsibility for their personal well-being (through lifestyle choices) which, in turn, would result in reduced government health and welfare costs and more effective use of the health care system. The impact of this report was felt in Alberta at both the provincial and local levels as Alberta Ministers of Education, Social Services, and Community Health combined forces in the review of the health care and health education of society. The result was the 1980 Alberta Education authorization of the development of a comprehensive core health curriculum for grades 1 to 12. The elementary health curriculum was scheduled for mandatory implementation in September 1984, while the junior high health curriculum was available for optional implementation in 1986. In 1985 a draft senior high health curriculum was developed under the auspices of the Health and Physical Education Coordinating Committee; the title adopted for the curriculum was "Career and Life Management."

The elementary and junior high health curriculum were based on nine themes developed in 1978 by the Interdepartmental Task Force on Health. Five of the themes authorized by the Curriculum Policies Board in 1979, provided the framework for the content developed for elementary and junior high health programs. These included self awareness and acceptance, relating to others, life careers, body knowledge and care, and human sexuality (optional). For the senior high health program an ad hoc committee developed a draft curriculum for two, five credit sequential courses for grades 11 and 12. The curriculum focused on three themes that evolved from the elementary-junior high health themes: interpersonal relationships, life careers, and life styles (Popowich & Prather, 1986, p.9). However, the senior high curriculum outlined a total of nine themes that were to be taught in the two year program. These themes included the following: 1) body knowledge, care and maintenance; 2) self-awareness and acceptance; 3) the family; 4) relating to others; 5) human sexuality; 6) preparation for marriage; 7) responsible parenthood; 8) life styles (spiritual and ethical ideals, death and dying, alternative life styles, man and his environment); and 9) life careers. Essentially, the draft curriculum included an outline of the nine themes complete with recommended student health objectives for each theme, and an indication of the possible overlap of the proposed objectives with the content or intent of existing senior high programs (*Health Education Curriculum Report*, 1985).

The draft curriculum was then presented to the Health and Physical Education Curriculum Coordinating Committee and was positively received. However, that is where the draft senior high health curriculum ended. In June, 1985 the *Secondary Education in Alberta* policy document was released; this document put a "freeze" on all senior high programs that were in their development stage. The policy set new directions, goals, and challenges for the review and development of programs. Therefore, the senior high health curriculum had to be reworked to reflect the concepts, skills and knowledge areas outlined in the Secondary Education policy statement.

## The Genesis of the CALM Curriculum

The development of the Career and Life Management curriculum began in February, 1986 when it was approved by the Alberta Education Instructional Program Review and Development Committee. The new curriculum was selected to be the first secondary education policy initiative to be implemented, educators and others were watching to see how things would develop under these new guidelines. While considerable work had already been done by the Health and Physical Education Coordinating Committee on the development of a draft senior high school health curriculum, CALM was to be disassociated from this previous work. It was to be promoted as a distinctly new program of study, unrelated to any existing curriculum. CALM was a core curriculum, not unlike mathematics, English or social studies. Consequently, people who had previously worked on the draft senior high health curriculum were replaced, and a new implementation team was assembled.. Their mandate was to build a new curriculum that would reflect the intents of the policy document. The rationale for this approach was never officially defined, however, CALM curriculum committee members and those previously involved in the development of the draft health curriculum provided their explanations during interviews.

Essentially, they identified five factors that might have influenced Alberta Education's decision to develop a distinctly new curriculum (CALM), rather than incorporating the content of the CALM curriculum into existing programs, or promoting CALM as an extension of the elementary-junior high health curriculum. First, a member of the CALM Curriculum Sub-Committee commented that "CALM is more than a 'health' curriculum. Health is but one component of a curriculum that is designed to provide students with the knowledge and skills to take control of, or to manage their own lives." The association of CALM with any existing curriculum could bring with it preconceived notions, expectations, and possible stigmas that are associated with the existing programs.

Second, Alberta Education researcher Donna Patterson (1986), reported that senior high students needed more than "health" education. She stated that the high rate of change in our society emphasized the already existing need for "self-management skills -- the developed ability to organize and shape one's life occupationally, financially, and personally/socially" (p.3). Citing Gysbers (1984), Patterson warned: "There has been growing recognition that our young people are ill prepared to cope with the ever accelerating rate of change that is the main offshoot of the electronic revolution. There is no indication that this rate will decrease" (p.3). In her report to Alberta Education, Patterson (1986) provided strong support for the need for a mandatory core CALM-type curriculum.

Third, some of those interviewed perceived a possible political motive behind Alberta Education's decision to make CALM the first initiative to be implemented out of the Secondary Education policy. They suggested that by promoting a curriculum like CALM (one that deals with the affective rather than the cognitive domain, and one that fulfills a recognized need among teenagers), the Alberta Government could be perceived as demonstrating to the public that they have been listening to their needs and opinions, and have addressed those needs through the CALM curriculum.

Fourth, CALM was viewed as being a good (expedient) curriculum with which to begin the implementation of the Secondary Education policy because very little review or revision of existing curricula would be necessary. In addition, the coordination of its implementation should be easier because the curriculum would not be associated with any existing curriculum department. Finally, the CALM development committee had the benefit of observing and learning from the developmental process of the elementary and junior-high Health Curriculum. Sensitive issues had already been dealt with at the elementary and junior high levels, and many of the community contacts and linkages have already been established in dealing with the implementation of the elementary and junior-high health program. As one Steering Committee Member commented, "the CALM curriculum developing committee gained from past experience and was better equipped to fight similar battles."

### Implications of the Policy for the Development of CALM

The initial stages in the formulation of the CALM curriculum involved an analysis of the *Secondary Education in Alberta* policy to make explicit the recommended curriculum development guidelines inherent in the document. The policy made no reference to the number of credits or the grade level for which the CALM curriculum should be designed. It did make explicit that students should develop skills and knowledge in five broad topic areas: careers (planning, skills and attitudes in the workplace); personal finance; life management (personal development, interpersonal relationships, effective learning skills); preventative alcohol and drug education; and other relevant societal issues. The policy recommended that the curriculum should involve parents and public and private agencies in the instructional program, and that it should develop a partnership with the community in assisting students in career planning and training.

The development of the Career and Life Management curriculum posed a number of challenges to the development committee. First, this mandatory curriculum had to be designed to address a wide range of student interests, needs, backgrounds, capabilities and learning styles. Second, the curriculum must provide strategies to ensure that the program content is kept up to date and relevant to current societal issues and student needs. Third, the curriculum structure must allow schools and school jurisdictions of all sizes to implement the program, and to be able to take advantage of local expertise and resources. Finally, CALM had to be designed (grade level and credit allocation) so that it would have a minimum impact on student access to other core and complementary courses (*Project Development Proposal*, 1985).

Based on their analysis of the Secondary Education policy statement, as well as a review of the previous development of the senior high Health curriculum, the CALM

Program Development Committee obtained approval of a proposal for the development of the CALM curriculum (February, 1986). In the document they recommend the development and field testing of a single Career and Life Management course for three credits. As an implementation alternative, they suggested the development of one-credit modules that could extend the course to five credits. The rationale for this approach was to permit schools to address local needs and to take advantage of teacher expertise as well as of community and school resources. In addition, a three-credit course would have a minimum impact on student access to other core and complementary courses, and would cause the least disruption to schools in terms of timetabling, staffing and budget allocations (*CALM Proposal for Initial Approval to Develop Curriculum*, February, 1986).

The second phase in development of the CALM curriculum was to establish an ad hoc committee (Steering Committee) for the purpose of developing the curriculum philosophy and course objectives, defining the scope and emphasis of the content, and making recommendations with respect to the program structure and document design, as well as resource support and implementation. The committee had a balance of practitioners and stakeholders, with representatives from school based personnel (an administrator, three classroom teachers with experience in related content, and one classroom teacher inexperienced in related content), from urban, rural, private, public, and separate school systems; representatives of interest groups (Alberta Social Services and Community Health, Alberta Manpower, Alberta Consumer and Corporate Affairs, the University of Alberta, and the Alberta Federation of Home and School Association); and Alberta Education Personnel (program manager, special education, learning resources). Finally, sub-committees were established to deal with specific dimensions of the program such as research on teaching strategies, development of criteria for student evaluation, definition of learning tasks, and the actually writing of specific units. The members were selected on the basis of recommendations from superintendents from across the province. Representatives from related government departments were appointed by Deputy Ministers.

Before the Steering Committee embarked on the actual development of the CALM curriculum, a review of the literature was conducted by Alberta Education consultant Donna Patterson, which resulted in the following reports: *Self Management Skills: A Review and an Approach to Career, Financial and Life Management*, *Issues Emerging From the Secondary Education Review*, and *Effective Inservice: A Re-Examination, A Discussion Paper*. In addition, Lynn Bosetti provided a report entitled *Effective Implementation Strategies*.

In a memorandum to CALM Project Manager Sharon Prather, Patterson (*Issues Emerging from the Secondary Education Review*, Memorandum, March 10, 1986) summarized issues that emerged from the Secondary Education Review that required some resolution as first steps in the development of the CALM curriculum. In the memorandum Patterson (1986, p.2) recommended that CALM be designed as a process oriented curriculum that would combine information giving and skill building to ensure that students would be able to both understand generic skills and to apply them in their own lives. With regard to who would teach the program, Patterson (1986) stated:

> If the course has any emphasis on process and skill building rather than information transmittal, the teacher ideally should be an individual with process skills. A specialist in building the kind of skills identified is essential. There are already present in many schools such individuals. Possible sources are the Personal Living Skills program and the guidance and counselling service to name only two. (p. 4)

She went on to explain that should such an individual not be available in a school, a teacher might take on the leadership in this course through the role of coordinator. The coordinator would then "draw on resources within both the school and the community to find the most effective personnel, resources and strategies for reaching the goals set for the course" (1986, p.4).

During the early stages of the inception of the CALM curriculum (See Appendix A and C) a number of steps were taken. First, the *Secondary Education In Alberta* policy document was analyzed with regard to directions and implications for the development of the CALM curriculum. Second, a review of previous work done on the development of the senior high health curriculum was conducted, and the draft curriculum was then analyzed in light of the guidelines and objectives outlined in the *Secondary Education in Alberta* policy document. Third, a proposal was submitted to the Instructional Program Review and Development Committee for approval to proceed with development of the CALM curriculum. The proposal provided pertinent background information concerning issues, challenges and implications affecting the development and implementation of the Career and Life Management curriculum. It proposed course specifications as a basis for initial development and piloting, suggested a strategy for the involvement of stakeholders and others in the development process, and included a timeline which indicated that a draft CALM curriculum would be developed over a four month period (March to June), in order to be ready for field testing in September, 1986. Finally, a Steering Committee and four curriculum development/writing sub-committees were established and taken through an orientation session in which the expectations, responsibilities and objectives for committee members were made explicit. On March 18, 1986 the official development of the CALM curriculum began. By June, 1986 the first draft was ready, and potential resources had been identified.

In July, 1986 an Invitational CALM symposium was hosted by Alberta Education (with financial assistance from Consumer and Corporate Affairs, Social Services and Community Health, and Manpower) at Barnett House in Edmonton. The CALM Steering Committee adopted the philosophy that the CALM curriculum should be "particularly sensitive and responsible to the needs of the community and concerns of the stakeholder groups" (*Proposal to Hold Invitational CALM Symposium*, 1986). They agreed that the period after completion of the draft curriculum and prior to initial field testing would be an appropriate time in the developmental process to invite feedback from and to build awareness of the program among the government and community groups which could support the implementation of the program. The main purpose of the symposium was to elicit a response from representatives of major stakeholder groups that would be involved in and/or affected by the CALM curriculum (i.e., various departments within Alberta Education, various Provincial Government Department/ Agencies/ Commissions; Federal Departments/ Agencies/ Commissions; Public Associations and Agencies; School Systems; Post Secondary Institutions; parents and students, and the Business sector). The symposium served five goals:

1. To build awareness of Career and Life Management objectives and potential impact on timetabling with school system and school personnel by discussing curriculum development and implementation.
2. To build awareness of Career and Life Management objectives among various community interest groups, particularly those who potentially impact course implementation.
3. To provide recognition for the cooperation of Alberta Consumer and Corporate Affairs, Alberta Manpower, Alberta Social Services and Community Health and other cooperating agencies/groups.
4. To encourage sharing of information among various stakeholders with respect to:
   -what is happening at the local level,
   -what local resources are available.
5. To serve as a model for workshops which could be held regionally. ( *Proposal to hold invitational symposium involving selected stakeholder groups* , Alberta Education, 1986)

The participants were given an overview of the proposed CALM curriculum and the involvement of various departments, groups and agencies in the development process. Locally developed CALM related curricula and relevant research regarding the need for a curriculum like CALM were discussed. Given this background information the participants in groups reviewed and prepared a response to the need for and content of the CALM curriculum. They then reassembled to share their responses, concerns and opinions. Finally, a few days later the Steering Committee reviewed and addressed the responses received at the symposium, and then prepared the final draft of the CALM curriculum which was field tested in September, 1986.

## Issues and Concerns

During the period from May, 1987 to June, 1988 a total of thirty-eight formal interviews and numerous informal interviews were conducted by the researcher across the province with a sample of people affected by the implementation of the new CALM curriculum. Individuals from school and school system administration, teachers, CALM committee members, Alberta Education officials, Regional Office Consultants, members of stakeholder groups, as well as students and parents were interviewed (see Appendix F). Because the interviews were conducted during the early stages of the implementation of the CALM curriculum, concerns and issues related to the genesis of CALM were prevalent.

### A Political or an Educational Decision?

Due to the pervasive impact of schooling on the development of children, many people and groups feel that they have a stake in what takes place in the educational system. Consequently, there are many "watchdogs" (for example, Alberta Teachers' Association, Alberta School Trustees' Association, Alberta Catholic School Trustees' Association, Alberta Independent Schools and Colleges Association, Home and School Association, and Conference of Alberta School Superintendents) of the educational system who monitor the development and implementation of educational policy initiatives. In anticipation of this external pressure concerning the development and implementation of CALM, Alberta Education adopted the consultative approach to policy development and attempted to plan, execute, and be accountable for what they did, keeping these "watchdogs" informed and involved where ever possible (Prather, 1988). As might be expected, there were a number of mixed reactions to the curriculum from stakeholder groups .

It should be made clear that the *Secondary Education in Alberta* policy statement is a provincial initiative, to be executed by Alberta Education. Consequently, the decision to implement any initiatives derived from this policy may be interpreted by stakeholder groups as being based on either political and/or educational motives. It may be viewed as being politically motivated because it is a Government initiated response to a perceived need of the electorate to which the Government is responsible. In contrast, an educational motive may be based on a need identified by educational experts (i.e., teachers, administrators, psychologists, professors) rather than by politicians. During the early stages of the implementation of CALM, the first initiative from the *Secondary Education in Alberta* policy, concerns regarding its origin and need were prevalent among stakeholder groups. When individuals interviewed for the study were asked by the researcher to share their perception regarding the origin and need for the CALM curriculum their response varied from skepticism to positive support. Some individuals responded with such questions as "Was CALM developed in response to a political need or was it developed in response to a real educational need?" and, "How could a program like CALM emerge from a smorgasbord of a little paragraph in the Secondary Education policy?"

One school administrator explained:

> CALM was a political decision. It was a matter of the Government asking 'what does the public want?' and then responding to their concerns and needs without really looking to see if we were already fulfilling those needs in the existing secondary education program. Consequently, CALM is little bits and pieces of existing courses. There were other ways to address the concerns and issues raised by the public without developing a new curriculum. For example, Alberta Education could have beefed up existing Family Life or Personal Living Skills programs, or directed more funds to guidance and counselling programs. Thus, I think that the decision to develop CALM was a political one in that it was a very visible answer to a problem, one that the Government could go to the public and say 'now we have addressed your concerns.'

Another curriculum supervisor commented:

> I would go so far as to say that CALM is a Home Economics course. However, Home Economics has a certain stigma attached to it, therefore there is no way, politically, that Alberta Education would make Home Economics mandatory, even though they could have saved thousands of dollars in the development of a new curriculum, because the Home Economics curriculum already existed. The reality was that socially, a mandatory Home Economics curriculum would never be accepted.

Many teachers and administrators thought that the promotion of CALM as new curriculum was a political move to demonstrate to the public that the Government was listening to the needs of the public identified through the Secondary Education Review and developed this curriculum as a means of addressing those needs.

Some interviewees expressed concern that because the CALM curriculum appeared to meet an identified need, the Government would conclude that the Secondary Education Review was a worthwhile process and a legitimate use of tax dollars. Underlying such sentiments is a suspicion regarding the validity and necessity of the whole Secondary Education Review process. Some respondents were concerned about following public rather than professional opinions. A superintendent explained his perception of the public support for the outcomes of Secondary Education Review:

> The Government can receive support in a number of ways. They can go to the public and say 'Do you want this?' And there will be a high percentage of people that do for example support the move toward a very rigorous and demanding academic program. However, there are very few parents who will entertain the idea that their child will not attain those high levels. So the Government gets the support. They weren't looking to teachers and those involved in education for a great deal of support. They were looking for what they had -- public support. I don't know if they are serving education very well by doing that.

A curriculum coordinator added:

> I want to say that CALM was as much a political decision as it was an educational decision. I'm just not sure which came first. The Government has to look like it is doing something about a survey that cost taxpayers "x" number of dollars. It has been said more than once, that to base any decisions on the kind of data collected for the Secondary Education Review would not be tolerated anywhere else. There was such a low rate of return on the questionnaire. Who is to say that the findings were one way or another? What was the political validation procedures? We have never been offered anything publicly about this.

This suspicion, however, may in part be the result of a lack of understanding or knowledge regarding the actual data collection and analysis process utilized in the Secondary Education Review, as well as inadequate communication from Alberta Education regarding these processes.

In a previous study (Bosetti, 1986) conducted by the researcher regarding the formulation of the *Secondary Education in Alberta* policy, it was apparent that most people associated the Secondary Education Review with a questionnaire that was distributed to all households and had a very low rate of return. One superintendent stated that "the Secondary Education policy was based on input from Albertans, but those that spoke out were a biased sample of outspoken parents and people that hold unrealistically high expectations of children and education." Actually, the Secondary Education Review was a lengthy process involving commissioned studies on adolescent needs and attitudes, forecasts of reasonable futures for Alberta and Canada as well as a Gallup Poll to determine the views of the public, student opinion polls, a newspaper-style questionnaire delivered to 856,000 households in Alberta, a review of changes occurring in other provinces and countries, and public forums held across the province (*Secondary Education in Alberta*, 1985, p.3).

Many educators and stakeholder groups were cognizant that a senior high health curriculum had been developed before the *Secondary Education in Alberta* policy statement was released. It was never fully explained to those involved in the development of the grades 1-12 Health curriculum what happened to the senior high component. Therefore, some of the respondents still perceived CALM to be an extension of the elementary-junior high Health curriculum.

A number of participants interviewed for this study viewed the decision to implement CALM as a combined political and educational decision, both of which were legitimate. A member of the CALM Steering Committee explained:

> CALM is the response of the legislature to community concerns. It is a matter of grassroots coming up and saying 'this what we think our kids need', and legislature responding by giving Alberta Education the task of coming up with something in response. So it was a political response to a community demand, and that is what makes CALM so unique.

Respondents who shared this perspective tended to support Alberta Education's decision to develop CALM. A superintendent stated, "Alberta Education, as a government institution, has the responsibility to respond to public needs, values and expectations." And a CALM Steering Committee member added, " the fact that two Ministers of Education have supported the development and implementation of a compulsory core CALM program, despite some strong opposition, makes CALM a significant program."

### Need For CALM

Much of the resistance to the CALM curriculum expressed by the participants was associated with the decision that it would be part of the secondary education compulsory core curriculum. Some administrators felt that they had little control or power over the decision to implement the curriculum. A principal of a small rural high school explained:

> You feel that decisions that are made at the top (Alberta Education), are often made without fully considering the implications at the bottom or school level. Sure they give us an opportunity to respond to and learn about the CALM curriculum, but when these ideas are presented to us we haven't had time to consider all of the implications yet, so we can't immediately react.

Another principal from the same region added:

> We attend Alberta Education sponsored meetings only to find out they are for the dissemination of information such as the philosophy of the new program and its rationale. We have no real opportunity for input, the decisions have been made regarding what is going to be done. Now they tell us the facts and where to go from here!

A superintendent stated:

> We have had little, or virtually no input as to whether the CALM program would or would not exist. It was quite clear right from the beginning that it was going to be a mandatory program. Theoretically, we have had input into the content of the CALM program through our teachers serving on sub-committees and on the Steering Committee. But the fact is CALM was a given. There were no arguments as to whether students should or should not have to take it.

Thus, the central issues and concerns regarding the implementation of the CALM curriculum were not focused on the content of the CALM curriculum, nor were they directed toward the need for and utility of the knowledge and skills taught through the curriculum. Rather, the central issues dealt with the mandatory nature of the curriculum.

Another negative reaction to the development of CALM dealt with the feeling that many schools were already addressing the need for a curriculum like CALM through existing programs, or through seminars, guest lectures, career days, or through some locally developed program (e.g., *Dimensions for Living* ). Their feeling was that educators at the local level were in the best position to determine what the students and community needed, and could best assess what resources and capabilities were available to address those needs. They resented courses being mandated from the top-down. A district administrator explained one Board's reaction to CALM:

> Our board was initially opposed to CALM for essentially two reasons. First and foremost, CALM was perceived to be a provincial mandate that infringed upon the Board's right to decide what is necessary for our students. Second, the Board was feeling pressure from high school principals who were concerned about the impact of CALM on their existing programs and on their staffing requirements.

The CALM Project Manager defended the mandatory nature of CALM by explaining that, while Alberta Education recognized that there had been some very good work done in subject areas similar to the themes dealt with in the CALM curriculum (i.e., Personal Living Skills, Business Education), these subject areas were optional, and therefore it was not possible to ensure that all students would receive the skills and knowledge covered in these areas. Prather stated:

> When you come right down to it, would you rather have that excellent information reach only 20 percent of the school population because it is an optional program, or should it reach 100 percent of the student because it is a core program? If you believe in the program and the content, and you are committed to what is best for students, then you'll have to opt for 100 percent. Besides, CALM can be a positive opportunity. Teachers can take various dimensions or themes in the CALM curriculum and expand on them in their complementary programs.

In general, Alberta Education took the position that if the skills and knowledge communicated through a curriculum are important to the personal growth development of students, then that information should be made available to all students in the form of a core curriculum.

## CALM and Diploma Program Changes

Many of the initial reactions to the CALM program were expressions of frustration over the proposed changes in the secondary education program as a result of the *Secondary Education in Alberta* policy statement. The majority of the interviewees felt that there was a very real need for a curriculum like CALM; however, the sacrifices that some schools would have to make in order to implement the curriculum were viewed as being too great. The problem seems to be rooted in the new diploma requirements. Some administrators viewed the new diploma requirements as being too focused on academic rigor (pass mark raised from 40 percent to 50 percent and students given a choice of working towards an Advanced or General diploma) and too prescriptive in nature, limiting student choice and flexibility because of the increase in course requirements. The result, one superintendent predicted, would be:

> an increase in the student drop out rate, a three and a half to four year high school program; narrowly, rather than broadly educated students, and the demise of fine, performing and practical arts programs.

He went on to explain that the option of striving for different diplomas (Advanced and General diplomas) would result in "the majority of students striving for the Advanced Diploma mainly because of parental pressure and their unrealistically high expectations for their children, as well as the possible perceived stigma that may become attached to the 'lesser' or non-advanced General Diploma."

The sacrifices that schools, and especially small schools, would have to make in order to make room for the new secondary education curricula (CALM being the first) had implications for staffing, timetabling and student access to core and complementary programs. With regard to student choice, student's timetables would be filled with more mandatory courses, and if students only needed 100 credits for graduation they would eliminate those "interest" courses that were not essential diploma requirements. The alternative would be for students to take those "interest" courses, but in exchange, be prepared to spend another half a year in high school.

Some principals stated that in making decisions regarding the staffing and timetabling of new courses, mandatory courses would take first priority, while complementary programs would take second, depending on student interest. They anticipated that this might result in the elimination of some complementary programs (i.e., Fine and Performing Arts, Vocational programs such as Beauty Culture and Industrial Arts), and that some of these teachers responsible for complementary programs would have to resort to teaching in other subject areas. In some schools, teachers would no longer be able to teach in only one subject area and could end up teaching as many as three different subjects. Some teachers felt that the outcome of these changes, in terms of their preparation time, would be to focus on teaching the newest, most unfamiliar course at the possible expense of the other courses.

Among school personnel talked to, development of the CALM curriculum was associated with apprehension because it in~~volved a~~ re-structuring of programs and priorities within each school in order to implement the many program changes in response to the *Secondary Education in Alberta* policy document.

In general, people outside the Steering Committee, the Sub-Committees and the Project Team varied in their knowledge about the Secondary Education policy process. Their opinions ranged from political acquiescence to public will, to listening to interest groups only, or ignoring educators' concerns, to repackaging old content into a new course without deleting the old, to a genuine need for the course. Some were concerned less with the course itself than with the prospect of beginning of a series of radical changes in secondary school programs and diploma requirements.

## Controversy Over The Content Of CALM

While the CALM curriculum encountered some resistance from what the Steering Committee referred to as the "reactionary fringe," it did not experience the same degree of controversy as did the elementary-junior high Health curriculum. They attributed this to a number of factors, the main one being that the development of the elementary-junior high Health curriculum served to reduce the impact of dealing with some of the controversial subject areas covered by both the Health and CALM curriculum. The junior high curriculum had already opened the doors to the discussion of once taboo issues such as human sexuality and body knowledge and care.

The Deputy Superintendent of Three Hills School Division (Dick 1985, p.31) explained that the controversy over the human sexuality component of the elementary-junior high Health curriculum brought into focus a more basic underlying question of "What should be taught in our schools?" He emphasized that this experience suggested that parents were genuinely concerned about the responsibility and limitation of the educational system, and that educators must be more sensitive to the wishes of parents. For him, the lesson to be learned was:

> [i]gnorance breeds misunderstanding and suspicion. Educators must generate confidence in their schools by convincing parents that they also genuinely have the welfare of the child and society at heart. This cannot be done by one teacher or administrator alone; it must permeate all levels right from the Minister of Education (sic) down to the classroom teacher (Dick, 1985, p.32).

The topics that had been areas of controversy in the elementary-junior high Health curriculum were also focused on CALM but to a much lesser degree. The major issue was the optional human sexuality component; the CALM Steering Committee initially proposed to have human sexuality integrated into the curriculum. Their rationale was that in order to address issues which are of relevance to this age group, awareness of sexuality, one of a teenager's primary concerns, needed to be addressed. They argued that the average age of puberty is dropping in both male and females with the physiological capability of reproduction occurring at age 13. While further maturity and consideration of marriage is not expected for another ten years, "in the interim teenagers must deal with changing norms and pressures, provocative media, and emerging personal awareness" (*Request for Approval to Integrate Human Sexuality into the CALM Program*, 1986, p.1). Their second point was that students are exposed to a great deal of misinformation during childhood and adolescence and require factual information to help them "to relate their developing sense of sexuality to their perception of who they are, how they see others, how others see them, and how they relate to others" (*Request for Approval to Integrate Human Sexuality into the CALM Program*, 1986, p.1).

Finally, the Steering Committee argued that people must acknowledge and deal with the reality that sexual activity is part of many students' lives. They cited an 1981 study done in Calgary which revealed that "24 per cent of 14 year olds and 66 per cent of 18 year olds indicated that they had experienced intercourse" (*Request for Approval to Integrate Human Sexuality into the CALM Program*, 1986, p.1). In addition, the number of cases related to sexually transmitted diseases reported in Alberta was more than twice the national average. For example, 80 per cent of cases of gonorrhea were reported in Alberta in the 15-29 year old age group (*Calgary Health Service Annual Report, Social Hygiene Statistical Report and Sexually Transmitted Diseases in Canada 1971-1984, Health and Welfare Canada*). In 1984, teenage pregnancy in Alberta was 54.1 per cent higher than the national average (*Statistics Canada, Vital Statistics: Volume 1, Births and Deaths, 1984, catalogue 84-204* ) and the two provinces with birth rates below the national average, Ontario and Quebec, had well developed family life curricula and accessible family planning clinics. The document concluded with a summary of professional associations and their reports (The Alberta Public Health Association, Canadian Public Health Association, The Medical Association, and The Report of the Interdepartmental Task Force on Health Education in Schools) that have lobbied for and support the need to implement a compulsory program which includes human sexuality (*Request for Approval to Integrate Human Sexuality into the CALM Program*, 1986, p.5). They stated that the result of "adolescent sexual activity and the related consequences have resulted in unacceptable personal and societal cost," (1986, p.1) and proposed that information and education was one way to combat this problem.

A second problem, initially related to the human sexuality controversy, was the issue of morals and values. A number of school trustees, parents and religious groups reacted to the CALM curriculum on the basis that it takes an amoral stance on human sexuality, permitting students to make their own personal decisions as to how they stood on the issue. A CALM curriculum supervisor defended CALM on the basis that it involves a process of value clarification. She explained:

> CALM gives students knowledge and information and shows them how to use that information in combination with personal values that the student may learn at home or through the church. They learn to make personal decisions based on decision making skills which combines facts with values and beliefs.

A principal from a large urban high school elaborated:

> CALM deals with value clarification, it does not impose values on students, but provides the opportunity for students to reflect upon and clarify their own value position. They have the opportunity to, and are encouraged to consult with significant others (i.e., family or church) in formulating their own value position.

From a review of the CALM curriculum the values implicit in CALM incorporate the Alberta Education's statement on Goals and Values of Education which emphasizes dignity, respect, and responsibility for oneself and others. A CALM Steering Committee Member stated:

> CALM is a reflection of those middle class values that we'd like to see most citizens adhere to particularly in terms of taking charge of yourself, being responsible, contributing to the community, and making the most of yourself to be a better person and to contribute to society.

Alberta Education made it clear with both the Health curriculum and with CALM that it would not accede to the wishes of a minority who were adamant that human sexuality not be taught in schools. In 1986, the Honourable David King, then Minister of Education, clarified Alberta Education's stance on the issue of moral education in a letter to parents concerned about many aspects of the elementary-junior high Health program:

> It is appropriate for the young child to be taught rules relating to basic values such as respect and tolerance, and that as the child develops the ability to reason, he develop the skills of inquiry and critical thinking. These skill are essential for the growth of a democracy and should in no way detract from the individual's ability to recognize or accept what many would consider to be absolute values or truths.

The solution to the problem of a lack of moral guidelines or a set moral framework from which to teach human sexuality in CALM was the decision by Alberta Education to make human sexuality an optional component at the provincial level. Local school boards would have to make the decision as to whether it would be taught in their system and whether it would be offered on a mandatory basis (with the provision that parents could have their child opt out of the course) or on an optional basis. They also made the concession to permit church related schools, with Alberta Education approval, to teach the CALM curriculum from within their prescribed Christian values.

For some groups, the CALM curriculum was secularly humanistic and in opposition to Christian values (similar comment had been made about the elementary-junior high Health curriculum). Members of the Alberta Catholic Schools Trustees' Association (ACSTA) expressed concern over the title of the Career and Life Management curriculum, feeling that the concept of "life management" was a secular concept that did not acknowledge a person's essential relationship with God in relation to the ability to take control of one's life. The rationale of "self management skills--the ability to organize and shape one's life occupationally, financially and socially" excludes the spiritual and religious dimensions of the person (ACSTA, 1988, p.1). The Alberta Catholic schools adopted the position that "Life is a mystery to be lived and not a problem to be solved." Consequently, the ACSTA's main opposition was toward the individualistic, consumer oriented, success oriented, competitive nature of human beings promoted in the CALM curriculum, wherein self/life management could be reduced to a few principles of management. The Catholic faith focuses more on the individual as part of a greater community and advocates that personal decisions should be made with the interest of the community in mind (ACSTA, 1988).

In response to the concerns expressed by the ACSTA, an accord was reached on December 3, 1987 between the Alberta Catholic School Trustees' Association and Alberta Education which permitted the integration of Religious Studies and the Career and Life Management curriculum. The accord "preserves both provincial policy and the intents of the Alberta Catholic School Trustees' Association...and retains both CALM and Religious Studies 15-25 in accordance with the intent of the secondary education policy statement" (ACSTA, 1988, p.1). The result was that the CALM curriculum would be taught in Alberta Catholic Schools from within the following philosophical framework:

> In Alberta Catholic Schools, Career and Life Management is viewed from within the Mystery of Creation; God's empowerment and our personal response. It is in this personal response that God's creation of humanity is invited to accept the many sides of existence. Self management, the necessary discipline within moral laws, is a quest which must be found from within each person. It is both exciting and rewarding. The Holy Spirit speaks through the living imagery arising from the 'unconscious part' in individuals. (ACSTA, 1988, p.2)

In summary, despite opposition to the CALM curriculum during its early stages of development, CALM was developed quickly with strong provincial inter-governmental support (representatives from various Government departments served on the CALM Steering and Sub-Committee), as well as the support from numerous health and social welfare related associations. Alberta Education held the position throughout the curriculum development stages that CALM would be a compulsory core course. The CALM Project Team was, however, committed to implementing the curriculum with the least possible disruption to the day-to-day function of the school system, and therefore was responsive to problems specific to certain situations (i.e., the Catholic system and some private schools). The controversy over the human sexuality component, the issues of values and morals, and finally, the objection to the human secular nature of the course did not influence the direction of the development of the CALM curriculum; these issues were dealt with through rational discussion. Alberta Education argued that the role of a public school system is not to place values into a specific religious context, rather it is the right and responsibility of parents to place what is learned in school into the context of family values.

## Summary

The evolution of CALM has been examined from a historical perspective, attempting to make explicit the contextual framework in which the curriculum emerged. The impetus for a curriculum that focused on health, lifestyle, and well-being can be traced to the 1974 National Department of Health and Welfare movement to improve the well-being of Canadians and to get them to take responsibility for their health. This movement eventually had an impact at the provincial level in 1977 through the establishment of an interdepartmental task force to investigate critical health needs of students. The task force recommended the development of a mandatory core health curriculum for grades 1 to 12. The result was the development and implementation of an elementary and junior high Health curriculum and a draft senior high Health curriculum. The senior high health curriculum, however, was never implemented because of the release of the *Secondary Education in Alberta* policy statement which set new direction for the development of curricula.

Many questions were raised regarding why the government made the decision to develop a new core curriculum (CALM) rather than revise existing curricula to address the mandate in the Secondary Education policy statement. Participants in the study identified five factors which they perceived as influencing the government's decision to develop CALM. The factors ranged from political motives, expediency in implementing the new policy, to past experience with implementing the elementary and junior high Health curriculum.

A number of concerns regarding the mandated nature of the curriculum and the consequent impact it had on student program choice were identified. Teachers and administrators expressed concern over the lack of consultation with the local level regarding the need for and content of the curriculum. The ACSTA objected to the instrumental approach to managing life advocated in the CALM curriculum because it did not take into consideration the creative, intuitive and spiritual dimension of people. Objections and skepticism revolving around the development of CALM were targeted on the view that CALM evolved more in response to a political decision rather than an educational need.

## Chapter 5

# DEVELOPMENT, AWARENESS AND ADOPTION OF CALM

The purpose of this chapter is to describe and explain the processes involved in the development of the CALM curriculum and factors which influenced that process. Specific attention is given to the human dynamics of managing such a project, and to the techniques and strategies employed by the CALM Project Team to gain support for and acceptance of the CALM curriculum in the school systems. The second part of this chapter examines strategies employed by the Project Team to prepare administrators and teachers from across the province with the knowledge and skills necessary to implement the CALM curriculum effectively. Finally, the chapter concludes with a discussion of the reaction of principals and teachers to inservice activities.

## The Context

The adoption and implementation of the new Career and Life Management curriculum was influenced by a number of factors that defined the context in which CALM was conceived, developed, and implemented. The most significant factors affecting the adoption of CALM were the political and socio-economic environment in Alberta as well as the psychological disposition of the actors embedded in that environment.

### The Socio-Economic Environment

The initiation of CALM came at a time characterized by economic instability. During the period,1984-1985, and once again during 1987-1988, the Alberta Government reduced funding to Education which in turn affected general funding for schools and resulted in a major reorganization of the structure of the Department of Education. Due to reduced operating grants, many school systems also experienced reorganizations in their own administrative structures and a tightening of budgets, with the concomitant effect of reductions in programs and teacher positions. Additionally, in a short period of time Alberta Education introduced a number of new policy and program initiatives (i.e., Management Finance Plan, Teacher Evaluation policies, and Student Evaluation policies) which added to an atmosphere of anxiety often associated with change and uncertainty. Under these circumstances the predominant concerns of most school administrators were focused on system maintenance.

### Psychological Disposition

Some school administrators perceived the adoption of CALM as an opportunity for recognition as progressive administrators (keeping abreast of change) or possible career advancement. In the interviews a number of school administrators expressed the view that CALM was an administrative challenge in terms of successfully managing the logistics of implementing the curriculum (staffing and timetabling, and teacher inservice). They also viewed it as an opportunity for individual growth through the experience of becoming involved in a new subject area. However, one CALM curriculum specialist observed "there are those administrators and teachers who get in on the ground floor of an innovation or change for political reasons and to advance their career or status. However, once the fireworks of initiating the program is over there is no real commitment to ensure the maintenance of the program."

For some teachers, involvement in CALM meant job security and possible career advancement as emerging leaders in this new field. A CALM Coordinator and workshop facilitator for a large urban district commented on the reaction of one of her peers to her involvement in CALM:

> One fellow on our staff cornered me in the office and said, "Well, you've secured your job for a while!" That comment hurt. While my involvement in CALM has secured my position in the system, it was not my main reason for becoming involved. I was ready for a career change and a challenge and CALM provided me with that opportunity.

Another CALM teacher and workshop facilitator added:

> Teachers have concerns regarding what is going to happen to their programs and their positions as a result of implementing CALM. Some are very receptive to becoming involved in CALM as an alternative area of specialization. A lot of them see the writing on the wall.

Involvement in CALM also aroused questions of personal capability, school philosophy, program priorities, and the possible reduction of staff due to program redundancy. One school administrator felt that the implementation of CALM when combined with the other Secondary Education Policy changes was overwhelming and intimidating. He was not sure that he had sufficient knowledge or resources to manage adequately the implementation of all of these changes. Another administrator expressed concern regarding which programs to cut to make room for CALM because of the repercussions his decision would have on teaching positions and student program choice. Teachers and students in his school prided themselves in the music and athletic achievements which he felt were threatened due to the implementation of CALM and other secondary education program changes. Consequently, how administrators or teachers perceived the impact of CALM on their personal positions in the school system was a significant determinant of whether they supported or opposed the implementation of the CALM curriculum.

## The Political Environment

The political situation in Alberta also was undergoing major changes during the time in which CALM was initiated and scheduled for implementation. One of the major contributors to this period of instability was the June 25, 1985 resignation of Premier Peter Lougheed, leader of the Government of Alberta and the Progressive Conservative Party for the previous fifteen years. The city editor of the *Edmonton Journal*, Shelia Pratt (1987), summarized the impact of Lougheed's fifteen year reign:

> Lougheed's autocratic style of leadership had squeezed the initiative out of the party and had driven off aspiring leaders. He left a front bench sorely bereft of political smarts and intellectual leadership. The rank and file, after years of unwavering loyalty to one man, did not dare act on their own. (p. 92)

Pratt concluded:

> Without his [Lougheed] driving force, his intensity, dedication, keen political instincts and hard work, the Tory party might never have risen from its ragged beginnings to its unprecedented electoral success. But his immense personal power was in the final moment the party's weakness. The rank and file must now struggle to find the strength the retired general took with him. (p.101)

The result of Lougheed's resignation was the selection of Donald Getty as the new leader of the Progressive Conservative party. In the election of May 8, 1986 the Progressive Conservative Party attained its fifth straight victory, but lost 22 seats of 83 (Lougheed had confined the opposition to six seats after the 1975 election). This lent legitimacy to the opposition parties and created a sense of political plurality in Alberta. Pratt commented on the results of the May 8, 1986 election and the selection of the Honourable Donald Getty as Premier:

> The election results showed [Getty] failed to unite the [Conservative] party after the leadership race and revitalize the party's image. His low-key style didn't inject any sense of urgency into a deteriorating economic situation. Getty didn't give the voters a vision. At the end of the campaign, they still wondered where he wanted to take them. (p.112)

Along with the election of a new Premier who brought a certain change in leadership style and unclear vision for the future of Alberta, the Department of Education underwent a second change in Ministers since the Honourable David King had been replaced by the Honourable Neil Webber in 1986. The new Education Minister, new to politics and to the Progressive Conservative party, was the Honourable Nancy Betkowski. As a result of these changes the Department of Education faced the prospect of integrating the priorities and agendas of a new Minister and a new government. The changed political situation brought into question government priorities and where education ranked in that list of priorities. It soon became apparent to the new government that economic policy alone could not guide Alberta and satisfy the electorate. During this period critics of the

Progressive Conservative government accused the government of being preoccupied with the economic goals of the province and of being insensitive to peoples' social needs. In response to these criticisms the government decided that a policy should be developed which not only would reflect that they were a caring, responsible and socially conscious government, but also would provide a framework for future decisions. One government official intimately involved in the development of the social policy, explained that the government envisioned social and economic policy as being two sides of the same coin. He explained that "social policy was needed to encourage citizens to become self reliant, responsible, participating members of society, and that economic policy was necessary to provide people with the wealth, goods and services that they required." Consequently, on March 28, 1988 the government announced its statement of social policy for Alberta-- *Caring and Responsibility*-- and Premier Getty announced his commitment to the family. Education, as a vehicle for achieving mandated social and economic goals, appeared to have a place and was safe among the governments list of high priorities.[2]

## The Educational Environment

In conversation with members of the CALM Project Team it became apparent that from the outset they were cognizant of the possibility of CALM becoming the scapegoat for other problems in the system (i.e., restricted funds, program redundancy, number of changes required due to the *Secondary Education in Alberta* policy statement). One committee member commented "heart strings are pulled when teachers and administrators witnessed the demise of otherwise good programs in order to make way for new secondary education programs." She went on to explain that "CALM was consequently viewed as the main culprit because it did not depend on or expand on any existing subject areas, nor was it a substitute course. It was a new course that had to be accommodated in the timetable." Another teacher reinforced this perspective when she stated that "CALM had become the scapegoat for 'bigger problems' such as declining student enrollment, staff reduction and new diploma requirements." She explained that because CALM was new "it was seen as being the culprit that was going to destroy already established programs." Consequently, the Steering Committee and Project Team discussed the possibility that some school administrators -- in their attempt to maintain a sense of direction and control in times of budget cuts, staff reduction, program reduction, and declining student enrollment -- may consciously or unconsciously have targeted CALM as the focus on which they could project their problems and concerns and resist or impede change as long as possible.

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[2] Education as a government priority was reflected in subsequent grant increases. By 1989 Education ranked the highest of all grant receiving agencies. The following is a summary of grant increases for Education since 1984: 1984-85 zero percent increase, 1985-86 a two percent increase, 1986-87 a four percent increase, 1987-88 a three percent reduction, 1988-89 a 3.4 percent increase, and 1989-90 a 5.5 percent increase.

This observation was supported by the comments of a CALM curriculum specialist and facilitator for CALM school administrator information/orientation sessions. She explained that from her experience with the implementation of CALM she had observed that much of the resistance to the curriculum had come from school administrators and had centered around issues of power, control and routine. She concluded that administrators

> didn't like to have [policy directives] mandated or imposed on them from above, and they didn't like these [directives] to interrupt their routine. The Secondary Education Policy had done both. As administrators attempted to accommodate changes to the secondary education program in their schools, some were forced to re-evaluate what was of priority in their school programs and to reflect upon their own philosophical position with regard to schooling and the role it should play in society.

A CALM curriculum supervisor added that in her district, opposition to CALM was originally based on her Board's reaction to the *Secondary Education in Alberta* policy statement and was an attempt to assert district power. She felt that her board believed that they could resist change by stating that they were not going to support the implementation of CALM. However, "when it became obvious that the Department of Education was not going to yield to the Board's pressure, and that CALM would remain a mandatory course, the situation became very sensitive."

Arguments against the implementation of CALM were anticipated by the Project Team and the Steering Committee and did emerge. They included concerns expressed by school administrators during the eleven CALM information/orientation sessions held across the province. These included the concern that CALM could fail because of inadequate funding for inservice training for teachers, incomplete resources, the perceived lack of real need for the new program, and because the implementation process was occurring too fast and without adequate consultation with local levels. However, those knowledgeable and experienced with program implementation felt that many of these arguments were based on fear and resistance to change, as well as on rumors and the essential lack of knowledge about or understanding of the CALM curriculum. A principal and member of the Steering Committee stated that "people must be kept up to date regarding changes and developments [with regard to CALM] to mitigate against rumors and the view that change is coming from on high. Information gives them a better sense of having some control." Another curriculum specialist and information session facilitator added, "people react to rumors and speculation unless they have accurate up-to-date information targeted at assumptions regarding how CALM will affect them and their position directly. They need to know what is happening, what is Alberta Education's position, and where they fit into the new changes."

The CALM Project Team also realized that CALM could not afford to fail during the two years of voluntary implementation because CALM set the precedent for future change initiatives resulting from the *Secondary Education in Alberta* policy. A CALM facilitator and curriculum specialist stated "the fireworks are always at the beginning of a program, however for change to be effective it must continue, and that is where it often fails

-- it doesn't become part of the daily routine." She went on to explain that "what worked to initiate a program may not work to keep it going. This should be considered and planned for at the beginning. The program initiator can only take a program so far, then the program needs new blood to carry it on."

The CALM Project Manager, Sharon Prather, explained that while her major responsibility was to design the CALM curriculum, and initiate its implementation (Curriculum Design branch of Alberta Education), in doing so she also had to take into consideration on-going support for its implementation (Curriculum Support branch of Alberta Education). Cognizant of school administrators' skepticism toward curriculum change as a result of past experience with educational reform movements, the Project Team made the decision to consciously work at gaining the trust and confidence of school district administrators that they would proceed according to an explicit plan in the development and implementation of CALM. In addition, they ensured that the necessary guidance, support and resources would be available by the date of mandatory implementation. They also ensured that local implementors would have the opportunity to attain the skills, materials and knowledge to facilitate the implementation of the curriculum. However, because the Project Team was not directly responsible for training CALM teachers, and because implementation of the curriculum was dependent on resources and input from community groups and associations and government support agencies (i.e., Community and Occupational Health, Health Units, Consumer and Corporate Affairs, Manpower, ADDAC) they established a network of cooperation and collaboration among school district administrators, school principals, CALM teachers, the Department of Education, and these agencies. In response to these needs and challenges the CALM Project Manager and the Project Team selected, what they described as a "well qualified cohesive Steering Committee," and together they worked to keep those affected by the implementation of the CALM curriculum informed. They also provided opportunities for them to express concerns, gain clarification, and to expand their skills and knowledge in areas related to the implementation of CALM. This was accomplished through information - orientation sessions conducted across the province, a symposium on CALM, the Alberta Education news bulletin *In Focus* , and by having members of the Project Team and Steering Committee speak at various teacher and administrator conferences, seminars, and workshops.

### Steering Committee Perceptions of the Curriculum Development Process

The adoption phase in the implementation of the CALM curriculum was examined primarily from the perspective of the CALM Steering Committee members and the CALM Project Team Manager. The rationale for this approach was that the perception of these actors regarding their mandate and the shape that the CALM curriculum ought to take could be contributing factors in determining the outcome of the final curriculum document, how it was promoted by Alberta Education and perceived by school implementors.

The majority of the CALM Steering Committee members were selected by the CALM Project Manager upon recommendations from superintendents from across the province. The remainder of the Committee was appointed by Ministers of portfolios that had an interest in the content and objectives of the CALM curriculum (i.e., Community and Occupational Health, Career Development and Employment, Consumer and Corporate Affairs, Manpower). The Government's decision to adopt an interdepartmental (hence interdisciplinary) approach to the development of the CALM curriculum was to demonstrate to the public that the Government viewed the education of Alberta's youth as the shared responsibility of the government, the community and the school system (*Career and Life Management Briefing Report,* January, 1987).

The establishment of an interdisciplinary Steering Committee had advantages and disadvantages. Committee members interviewed perceived the most significant advantage was that as an advisory committee, members brought with them valuable personal experience and expertise. A Committee member and representative of one of the supporting government departments explained that "Committee members brought with them valuable content expertise, differing views, values and expectations, coordinated input from other government departments, and a voice representing their department's philosophy." He concluded that "as a group they were more cognizant of the 'bigger' picture, and were therefore more politically sensitive in their decisions." However, the varied backgrounds of the Committee members also created some problems. A Committee member and representative of a specialist council stated that "initially people came with their own agendas and the belief that the curriculum should have a particular focus or thrust. Each person represented a particular perspective that needed to be heard, and they were prepared to fight for it." Early in the curriculum development process the Program Manager made it clear to the participants that the decisions that the Committee made would have an impact on the CALM curriculum across the province, and therefore, personal considerations may have to be made subordinate to those of the province. The Program Manager explained the significance of this task:

> When formulating an interdisciplinary steering committee it is important to have members who are committed to kids first and foremost, and then to their areas of expertise. They must be able to maintain this perspective in order to benefit from a synergism of effort and ideas. The trick is to meld the expertise of the committee members into a collective force that is working toward a common goal, even though each person comes in with their own agenda, some that are contradictory and some that are complementary. We have to mesh them together into a similar focus.

She explained the strategies that she used in order to bring the Steering Committee and sub-committees together and working toward a common goal. Her first priority was to establish a sense of broad ownership and support network for the development and implementation of the CALM curriculum. To Prather, her role in the management of the CALM project was somewhere between being a team captain and being the team coach:

> One of the major priorities I had was to build a team that was not dependent on any one person. A team that was committed to the program as a whole, but still had their own areas of responsibility so that they did not feel that they were just doing what they were told to do. Instead I wanted them to have a

> sense of ownership and responsibility beyond me, or any one of the people here. Implementation is the team, not Sharon Prather! The underlying objective was to expand this sense of ownership and team spirit from the Committee members down to the people at the local level, and ultimately into the classroom.

Prather began the project by attempting to outline the framework within which people were expected to work. At the very first orientation session for committee members she presented them with a document that clearly defined the mandate for the development of the CALM curriculum, the objectives and responsibilities of Steering Committee and sub-committee members. The document also included an overview of committee procedures which included consensual decision-making, codes of confidentiality, notice and records of committee meetings, a curriculum implementation timeline, and committee meeting dates. It also covered important procedural information such as learning resource approval procedures, relevant Alberta Education policies, and a list of appendices related to the curriculum development process, goals of schooling and education, instructional program review, general guidelines for detecting bias and prejudice, a tolerance and understanding audit, a committee membership list, and even an example of an expense form (*Orientation to the Career and Life Management Curriculum Development Committees,* March 27, 1986). The purpose of this overview was to establish from the outset the parameters and limitations within which the Committee would operate.

Once the framework was established and the parameters defined, the Steering Committee worked toward defining a common goal. They began with the seven guiding principles for Secondary Education in Alberta outlined in the *Secondary Education in Alberta* policy document, and the following statement:

> *Aim of Education*
> The aim of education is to develop the knowledge, the skills and the attitudes of individuals, so that they will be self-confident, capable and committed to making informed choices and acting in ways that will improve their own lives and the life of their community. (1985, p.7)

As well, the Committee had the policy statement program description:

> Career, personal finance, and life management skills, including personal development, interpersonal relationships, effective learning skills, career planning skills and attitudes required in the workplace, preventative alcohol and drug education, and other relevant societal issues. (1985, p.24)

From this information the Committee developed a framework of broad areas that should be encompassed in the CALM curriculum. They identified key words in the *Secondary Education in Alberta* policy statement that served as a guide for the development of curriculum themes and ideas, and the basis for the next step, which was the development of a model or symbolic representation of what the Committee was trying to achieve through the curriculum. Their aim was to "illustrate the interconnectedness and interdisciplinary nature of the emerging program and the concept that the program did not stand alone but was interconnected with Government and the community" (Member of Steering Committee). A number of working models were developed to specify the particular themes that would be covered in the curriculum and to then articulate the generic skills and concepts that should be integrated into each theme. As the Steering Committee worked together they developed a philosophy which clarified their understanding of their goal and mission in the development of CALM. A Committee member summarized this philosophy:

> We felt that students needed to have a balance in their education. They needed both academic and life skills, and what was deficient in the present secondary education curriculum were life skills such as decision making, self awareness, self management, financial planning and dealing with relationships. The CALM curriculum was designed to be interdisciplinary in each unit. That is, each unit or theme does not stand in isolation. We do not operate as neat little squares, what we do in our personal relationships may impact our career choices, our financial goals and our human sexuality. This is the kind of concept that we wanted to get across to students through CALM.

Consequently, the following working mission statement was developed by the Committee:

> The Career and Life Management Curriculum will provide a means of challenging young people to acquire the skills and information necessary to shape their own lives and to contribute constructively to society.

> The course will be a process-oriented, integrated program focussing on the development and appreciation of generic skills. (Career and Life Management Steering Committee, March 19, 1986)

The outcome of this endeavor was the development of two models. One was a schematic representation of the generic skills and integrating concepts addressed in each of the five themes covered in the curriculum (Appendix I, Themes, Concepts and Skills). The second model, initially referred to as the *Career and Life Management Implementation Schematic* (*CALM: A Preliminary Report*, January, 1987), and then presented at information sessions and workshops as the *CALM Support Network* (*CALM Curriculum Overview,* March, 1987), was a diagrammatic representation of all of the components or areas of support that the CALM teacher could access that would assist in providing the foundations for the successful implementation of the CALM curriculum (Appendix J, CALM Support Network). The central focus of this diagram was the ideal CALM teacher, equipped with the proper disposition, knowledge and skills, and supported by a network of school, community, parental, academic, business and government groups and resources.

The logistics of directing the Steering Committee toward the creation of a common vision and of working toward a common goal required gaining consensus among the members in the shape and direction of the CALM curriculum. Prather explained that she attempted to provide Committee members with the time and opportunity to express their concerns and points of view, and then as manager, she pointed out to them the similarities in ideas:

> Often the conflict lies in a matter of terminology that different specialist areas will use. Or it can be because the participants have not had the opportunity to communicate with each other and consequently do not see the similarities and the possibility that they may have a similar focus if only they would agree to do things a little differently. With a little compromising they could better approximate the attainment of what they all want.

The Steering Committee defined the task at hand in a manner which would enable them to develop the CALM curriculum within the prescribed time-line (February 1986-June

1986). A number of the Steering Committee members explained how this was achieved. The Program Manager gave them a clear mandate of what their role and responsibilities were in the curriculum development process together with a precise timeline regarding the proposed program development schedule. Proposed credit time allocations for the program itself were also indicated. This information served to keep them cognizant of parameters within which they had to work and also made them cognizant that compromises probably would be necessary. A member of the Steering Committee who was also a guidance counsellor explained:

> When we gathered as a committee we each had our own agenda, and viewed ourselves as representing a particular voice that needed to be heard, and we were prepared to fight for it. However, once the committee developed a sense of ownership for the curriculum and had bought into the project as a whole, we no longer felt that we were representing just our own discipline; rather, we felt that we were working toward making decisions that would be in the best interest of the program. We came to respect and appreciate other member's personal and professional strengths aside and beyond what they officially represented. Because of our varied backgrounds and areas of expertise we were better able to get a grasp of the the "big picture," and what was really happening in the province of Alberta in terms of the needs of teenagers and society.

Another Committee member commented on the members' commitment to the project. He attributed the commitment to the feeling that what they did and what they had to say really mattered in the development of the CALM curriculum. They believed that their decisions would have an impact on students. They felt that they were not just a "rubber stamp" committee playing a political game. Steering Committee members felt that much of this feeling was created and sustained by the Project Manager who was willing to listen to committee members and who demonstrated respect for their ideas. This helped to create an atmosphere of tolerance, a willingness to learn from one another, and a feeling of being part of a team. A Committee member and government representative commented:

> Sharon's enthusiasm, commitment, and belief in us and in the program was contagious. Her honesty in admitting "I don't know anything about this, I need you guys" made our effort and contribution seem meaningful and important. We weren't afraid to take off the boxing gloves and argue over

> what we should or shouldn't do. We heard each other and we worked together.

One of the women on the Steering Committee described the curriculum development process as being something similar to giving birth to a child. She explained:

> There is the initial pain and frustration in actually coming up with a philosophy and model for the program, and attempting to create a sequence that would address all of the desired skill and content areas. The tight time constraints imposed by Alberta Education added to the stress, but also forced us to push forward. The end result was joy and satisfaction, and a sense of accomplishment with the finished product.

The actual curriculum writing was done by the Curriculum Sub-Committees with direction, consultation, and approval from the Steering Committee. The Steering Committee was concerned with providing a framework and philosophy to provide direction for the program, and then reviewing and revising the program as it was developed. They began by identifying generic skills for life management that would give students confidence in their ability to cope with the stress of growing up in a rapidly changing world and would assist them in learning how to deal with feelings. In addition, these skills would help students to understand and appreciate how careers, relationships, health and finance all affect their lives.

With this objective in mind, the Steering Committee identified three generic skills that would be integrated into each theme in the curriculum: thinking, communicating, and dealing with feelings. As well, the Steering Committee defined seven generic concepts, which later became the goals of the CALM curriculum, that they felt were integral to preparing students with life skills to cope as independent, contributing members of society. Within each theme the CALM Steering Committee felt that the student should:

> •Develop **awareness** and **understanding**
> •Develop and apply **decision making** skills
> •Develop and apply **action-planning** skills
> •Identify **rights** and exercise **responsibilities**
> •Explore and respond to personal and social **issues**
> •Identify sources of **support**
> •Respond to **choices** and **challenges**
> (*Career and Life Management 20 Curriculum Guide, Interim* 1987, p.3)

Finally, the Steering Committee agreed that the curriculum should be process oriented in content and delivery. That is, students should be encouraged to become actively involved with the curriculum objectives through "participation in learning experiences, co-operating and interacting with fellow students, and communication with the teacher on an ongoing basis" (*Curriculum Overview,* March, 1987, p.2). The final program structure developed by the Steering and Curriculum Sub Committee is summarized in Appendix I, Themes, Concepts and Skills.

## Curriculum Validation

During the period of July, 1986 to May, 1987, the Career and Life Management curriculum was subjected to what the Steering Committee defined as a number of forms of validation. The validation process was viewed as an opportunity for the Project Team to receive input from practitioners and interest group regarding the suitability of the scope, content, and areas of emphasis in the curriculum. The validation process also assisted the Curriculum Sub-Committees in modifying the program at key intervention points in the development process, to identify suitable resources, and to build awareness and an accurate understanding of the program (*A preliminary report to curriculum branch on program development and implementation*, May 12, 1986, p.4).

In order to provide for opportunities for input and changes the Project Team conducted four types of validation: validation with Alberta Education curriculum development guidelines (Goals of Education, Goals of Schooling, Goals of Secondary Education, Secondary Education Review Policy Statement, Child Development, Catalogue of Essential concepts, Skills and Attitudes/Values), articulation with Elementary and Junior High Health, validation in the classroom through field testing, and validation with individuals and groups (*A preliminary report to curriculum branch on program development and implementation*, May 12, 1986, pp.4-6).

The process began in June, 1986 with an external review in which a draft of the curriculum was forwarded to over fifty individuals and groups who had indicated an interest in the development of the CALM curriculum. These groups included various government agencies, classroom teachers, parent groups, and professional associations. The participants were asked to comment on or confirm the suitability of the scope, content and areas of emphasis in the curriculum, as well as to raise any issues or concerns that they may have related to implementation.

The second phase in the validation process was to hold an invitational symposium to discuss the CALM curriculum and to review the initial developmental work. Over 120 people attended the symposium on July 3, 1986 as representatives of various interest groups such as parents, students, teachers, school and school system administrators, government agencies, public associations, post-secondary institutions, and business. The participants reviewed the proposed curriculum and shared their reactions. The CALM Steering and Sub-Committee met jointly on July 4, 1986, to review the recommendations made by the participants at the symposium. Based on the general discussion at the symposium and the post-symposium meeting of the Steering and Sub-Committee, the Committees unanimously supported ten recommendations for action (*Report on Career and Life Management Symposium*, July 3, 1986, p. 4). The recommendations dealt with ensuring that the process-orientation be clearly visible in the curriculum guide, that the curriculum be implemented at the grade 11 level and worth five credits, that inservice education be essential and ongoing, the themes be modified to be less self-centered and more "other" oriented, that human sexuality be addressed within all themes, and that teachers be provided with strategies and a resource manual that promotes experiential learning. Finally, they recommended that CALM be "marketed" at all levels, that certain themes be further developed, and that the curriculum guide should be expanded to include specified areas (*Report on Career and Life Management Symposium*, July 3, 1986, pp. 4-5).

The third and most significant phase in the validation process involved the field testing of the CALM curriculum in selected high schools. The field testing process was divided into two semesters and involved both formal and informal field test sites. In April, 1986 school administrators were invited to nominate potential field test teachers. The CALM project team's decisions regarding the selection of field test sites were based on a number of factors. For example, they wanted to have field test sites that represented a balance of urban and rural schools, small and large districts, various geographic regions in the province, and schools of varying size. In the first round of field test, teachers were selected to examine and test the actual content of the CALM curriculum. Prather explained that in the first round of field testing "we selected expert teachers who were familiar with process teaching, and that could focus on the content and determine if it was on target with meeting the interest and needs of the students." They assessed the strengths and weakness of the content of the program, as well as possible revisions. She went on to say:

> Given the aim of the this first round of field testing we had to have competent teachers who could jump through the necessary hoops and obstacles in order to implement the program. They had to be competent because while we had identified some print and media resources we needed their help to determine the suitability of these resources, and where ever possible identify additional suitable resources.

The second round of field testing was conducted with a revised curriculum. The revisions were based on recommendations made by the first round of field test teachers. The objective of this round was to once again examine the suitability of the content of the program and students' reactions to it, as well as to focus on the logistics of implementing the program (time allocation for each theme, teaching strategies, methods of evaluating student progress and achievement, suitability of learning expectations and appropriateness of course sequence, effectiveness of learning resources and teacher resources). The field test teachers identified, reviewed and evaluated resources for the program and developed methods for evaluating student progress and achievement. They also made recommendations with regard to timetabling, class size, room facilities, and program planning.

The Steering Committee and the field test teachers worked cooperatively. Usually the field test teachers met with the CALM Project Team on a Monday and Tuesday to review and to give feedback on the implementation process. The Steering Committee would then meet with the CALM Project Team on Wednesday and Thursday to deal immediately with the concerns and problems identified by the field test teachers. The teachers served as a direct channel to the CALM Project Team, transmitting issues, problems and concerns expressed by their students, administrators, teachers and parents. A Steering Committee member explained the kind of information the Committee was listening for when receiving feedback from both the formal and informal field test sites:

> As Committee members developing a prototype curriculum we were keenly interested in two kinds of information: content and manageability of the curriculum. With regard to the content, we wanted to know if we were on track in terms of program content. We wanted to know if we were meeting student's needs, that the content was age appropriate, that it was targeting issues that are of concern to grade 11 students, and that the program was not too long or too short, and that it was not an information overload for students.
>
> With regard to the manageability of the program, we were interested in its teachability. Could any teacher teach the content material with some inservice, or would they need special training? Secondly, was the program too specialized and burdensome in terms of preparation and delivery for one teacher to handle? When developing a new program that is supposed to be relevant and practical to students the answer to these kinds of questions is vital.

During each semester twenty schools were selected to field test the CALM curriculum, and an additional thirty schools were selected to field test the curriculum on an informal basis. The informal field testing was conducted in response to the high interest expressed by schools when asked to submit nominations for formal field testing. These schools agreed to implement CALM on a voluntary basis for one year. While participants in the informal field test sites did not attend the orientation and debriefing sessions held for the formal field test teachers, they still had an opportunity to have an impact on the CALM curriculum. The Project Manager explained how informal field test sites benefited from this experience: "The advantage for the field test school was that the participants had a direct channel to Alberta Education where the CALM Project Team was willing to assist them in the implementation of the program and welcomed and appreciated their recommendations and concerns." In addition,"the participants had an opportunity to develop a sense of ownership in the development and implementation of the CALM." However, Prather made it clear to the informal field test schools that the curriculum that they were implementing might not be the same as the final curriculum because it was still evolving as a result of the validation process.

The CALM Project Team also benefitted from the involvement of informal field test sites. It gave them an opportunity to "establish rapport with the schools, and provided an avenue for them to build awareness among the staff as to what the CALM curriculum was all about and the impact and repercussions that it might have on the students and the school" (Prather, 1987).

All of the formal field test teachers attended a two day orientation seminar, a one day interim meeting, and a two day debriefing session. The orientation seminar was designed to give the participants the opportunity to discuss the implications of the course and the applicability of strategies for delivery in their particular school situations. Prior to attending the seminar the teachers were asked to outline any questions or concerns that they had regarding the implementation of the curriculum so that these queries could be addressed at the orientation seminar. The concerns essentially dealt with the availability of resources and the delivery of the curriculum content (*Career and Life Management Inservice and Orientation Seminar for Field Test Teachers, Semester I,* August, 1986).

The orientation seminar served a number of objectives. First, it was designed to prepare field test teachers to meet the objectives of the draft CALM curriculum by providing them with knowledge about the course and the resources that were available to support the field test (i.e., curriculum documents, designated print and media resources, and community based support networks). Second, the sessions were designed to help teachers to build skills in the use of process oriented instructional strategies and to help them to use effectively resources appropriate to students' needs and developmental stages. The sessions also focused on assisting teachers to implement the curriculum effectively through addressing individual needs, local concerns, and classroom or school needs. The teachers were given the opportunity to experience some of the activities that the students would be involved in and to discuss with others how these experiences could be related to students' needs. Finally, the sessions were designed to encourage field test teachers to become emergent leaders or curriculum specialist who could assist in the inservice education of CALM teachers and in the implementing of the curriculum in their district. By making the field test teachers aware of the philosophy and content of the curriculum, student and teacher expectations, teaching strategies, how CALM articulated with other subject areas, and the importance of a cooperative planning effort, the Project Team hoped they would be able to assist other teachers involved in the implementation of CALM. The underlying objective of this endeavor was to begin to establish a support network for CALM teachers in various districts (*Career and Life Management Inservice and Orientation Seminar for Field Test Teachers, Semester I,* August, 1986).

The interim sessions were designed as information-sharing sessions. Field test teachers gave reports on how they were coping with the implementation, submitted and discussed their evaluations of the themes that they had taught so far, and also shared lesson plans, ideas, methods of student evaluation, teaching strategies, and resource materials. In addition the sessions focused on expanding teachers' knowledge and skill in preparing, identifying and modifying student learning activities and experiences to meet the students' individual needs. A workshop was conducted to develop teachers' knowledge in, and strategies for, teaching thinking skills. Thus, these interim sessions gave field test teachers an opportunity to interact with one another and provided the Project Team with feedback regarding the implementation of the curriculum. As well, Field test teachers identified issues and concerns that required immediate attention from the Steering Committee and Curriculum Sub-Committee (*Interim Meeting, Information and Preparation,* March, 1987).

The final debriefing sessions served a similar purpose as the interim sessions. The first priority was to identify revisions to the student learning objectives for each theme. Each theme was then reviewed to clarify what should be identified as required or elective components, to determine the time allocation for each sub-theme, and to modify ambiguous or unclear wording. The second priority was to discuss evaluation and teaching strategies used for each theme and to recommend resources. The third priority dealt with identifying issues and concerns of the field test teachers with regard to curriculum, resources and implementation, and to discuss possible strategies for dealing with these issues and concerns. Finally, the session dealt with preparing field test teachers to become facilitators for inservice sessions throughout the province. The teachers were given an overview of the provincial implementation plan for CALM and an overview of research on effective inservice activities. They were then allowed to choose if they wanted to work with implementation in small (up to 500 students) schools, medium (500-1000 students) schools, or large (over 1000 students) schools. The teachers were divided into groups according to selected school size, and asked to develop an action plan for the implementation of CALM for a school of that size. The plans were to include recommendations regarding how Alberta Education could assist schools in the implementation of CALM, the development of local inservice activities and in the formulation of support networks at local levels. Field test teachers were then asked to volunteer to act as "curriculum contacts." A "curriculum contact" was defined as a "an individual who is knowledgeable about the curriculum and who would be willing to assist others in their region to implement CALM, to answer questions, and to assist in organizing and conducting workshops" (*CALM Semester II Field Test Debriefing,* May, 1987). The session concluded with the field test teachers sharing their recommendations for action planning for the implementation of CALM in their own schools and school districts.

## Developing Understanding of and Support for CALM

During the early stages of policy implementation the primary concern of provincial implementors was with the development and understanding of and commitment to the intent of the policy among local level implementors (i.e., administrators and teachers) *(Career and life management: A preliminary report to curriculum branch on program development and implementation*, May 12, 1986, p.6). Some of the CALM Steering Committee and Curriculum Sub-Committee members referred to this phase in the implementation of CALM as "educational marketing." A Curriculum Sub-Committee member explained this concept:

> Implementation is educational marketing in which awareness and knowledge are the founding blocks. The biggest obstacles to implementation are distorted information and the fear of the unknown. The objective during this early phase is to give people enough accurate and current information so that they can make independent educated and intelligent decisions.

In the *Career and Life Management Preliminary Report*, the CALM Project Team identified seven "marketing" strategies designed to "build awareness of and the commitment to the program among key actors such as teachers, administrators, counsellors, school administrators and concerned community groups" (January, 1987, p.5). These strategies included the following: participation in workshops, conferences and seminars; the submission of articles to newsletters and magazines; hosting an invitational symposium involving public and target groups; conducting orientation sessions throughout the province for school counsellors and administrators to provide information on how to implement the program; identifying inservice needs through a questionnaire, sponsoring a conference on CALM; and encouraging post-secondary institutions to provide pre-service and inservice programs. The CALM Project Team appeared to view the task of creating awareness of the CALM curriculum as being synonymous with the task of selling or promoting the program.

### Alberta Education Inservice Education Strategy

The CALM Project Team developed a strategy for providing inservice education of those people (i.e., teachers, administrators, government agencies, community groups) responsible for and/or involved in the implementation of the the Career and Life Management curriculum. The task of building an awareness and understanding of the CALM curriculum was to be integral to the developmental process. The goal of the Project Team was to provide key actors such as teachers, administrators, counsellors, school administrators and concerned community groups with enough information early in the implementation process so that they could begin to prepare to assist with and provide support for the implementation of the CALM curriculum (*CALM Information Session,* June, 1987).

After the initial field testing of the proposed CALM curriculum through two rounds with teachers from across the province, the Project Team began to concentrate on "awareness-commitment building" process. They conducted information/orientation sessions for the regional offices of Consumer and Corporate Affairs, Alberta Manpower, and Community Health, since they were key support branches for the implementation of the CALM curriculum. Their next target group was school system decision makers. This group included such people as school district administrators, school administrators, and individuals designated as school system coordinators. Information/orientation sessions were conducted for school system decision makers in various regions across the province. The objective for these regional orientation sessions was to communicate the structure, intent and resource expectations of the CALM curriculum (*Career and Life Management Proposed Implementation Plan,* November, 1986).

The sessions began with an introductory activity in which the participants were asked to complete a true or false quiz entitled "What Do I Know About CALM?" The participants then shared their answers with a partner or the group. The quiz served as an introduction to the content of the seminar and at the same time gave the participants an indication of how familiar they were with CALM curriculum content, origin, and planned implementation. The participants were asked to outline on index cards any issues or concerns that they had regarding the implementation of the CALM curriculum and to then outline what they perceived to be the strengths of the program. These cards were submitted to the seminar leaders. Out of 102 participants, 46 percent indicated that their main concern regarding the implementation of CALM dealt with the selection of appropriate teachers. Issues such as teacher qualifications, interest and motivation were part of this concern. Twenty-five percent of the participants indicated that they had concerns regarding the mandatory nature of the curriculum and the impact it would have on student program choice, while twenty-two percent indicated concerns related to whether the mandatory curriculum would provide a challenge to the various ranges of student ability. Finally, twenty percent indicated a concern regarding the funding and availability of teacher inservice, forty one percent were concerned about the availability of resources, and seventeen percent had concerns regarding the impact CALM would have on the availability of other complementary programs.

With regard to the perceived strengths of the CALM curriculum, of the 112 responses forty-eight percent indicated that the curriculum content focus on "practical life-skills" was positive, and thirty-three percent viewed the curriculum as fulfilling a current need of high school students. Twenty percent indicated that the "process orientation" of the curriculum was positive and that the content was current and relevant to student interests. Finally, sixteen percent of the participants viewed the compulsory aspect of CALM as a requirement for the attainment of a high school diploma
positively.

The seminar leaders provided the participants with an overview of the CALM curriculum philosophy and objectives, emphasizing the proactive nature of the course in terms of career decision making and life management. The participants were divided into small groups convened by a facilitator who was member of the CALM Project Team, a Regional Office consultant, a Curriculum Sub-Committee member, or a field test teacher.

In these small groups the participants were encouraged to discuss concerns, issues, and the perceived strengths and weakness of the CALM curriculum. These concerns and issues were once again recorded on index cards and submitted to the group facilitator. When the groups re-convened they discussed the strengths and weakness identified by the groups, and the participants were encouraged to recommend solutions to problems and concerns. The five major concerns expressed by the groups were focused on resource availability, funding and support (45 percent); teacher selection (39 percent); the impact CALM would have on other complementary programs (39 percent); the funding and availability of teacher inservice (37 percent); and finally, the scheduling of CALM into the current secondary education core and complementary timetables in each school (37 percent).

The responses summarized in the preceding paragraphs indicate that at this stage of early implementation school decision makers (administrators) perceived that the problems, issues and concerns related to the implementation of CALM were more predominant than perceived strengths and benefits of the program. Participants were in general agreement that CALM met a current need in the secondary education programs, and that the content and process orientation were a positive addition to the core programs. However, the strengths of the CALM program were not the predominant focus of the seminar. This may have been a function of the agenda proposed by the seminar leaders, or it may have been a function of the needs and interests of the participants. CALM was a mandatory curriculum that had to be implemented by 1989, and administrators' main concerns were related to those aspects of implementation for which they were responsible--the logistics of putting the curriculum into place in their schools. Therefore, it is not surprising that at this point in implementation (which for many was still at the awareness and understanding stages) such issues as providing adequate facilities and resources, appointing the appropriate teachers, scheduling the program into the present school timetable, and finally, dealing with the negative repercussions that the implementation of the curriculum might have on staffing, student course selection, and the availability of options, could result in a possible administrative nightmare. Despite the perception that the CALM course met a current need in secondary education that was directed at facilitating the learning of much needed life skills in an interactive and practical way, this was not perceived by some school administrators to be compensation enough to account for the administrative workload created by its implementation. One principal in rural Alberta explained why he was reluctant to support the implementation of the CALM curriculum:

> There is so much change happening as a result of the Secondary Education Review that it can be overwhelming for an administrator. I have been a principal in rural Alberta for many years and I must admit, these changes are intimidating. It is easier for me to resist change than to implement change or to change myself. If Alberta Education really wants to have educational reform then they need to get rid of all of the dead wood and to bring in young and innovative administrators that can begin to cope with these changing times. At this stage of the game I don't think I have the energy or inclination to keep up. It would take a lot of retraining to change me.

Another principal and member of the Steering Committee explained that when a new program is being implemented school personnel are often uncertain about what it entails, why it is necessary, and how it will affect them. There is a general atmosphere of apprehension and distrust. As principal, he had to first become knowledgeable about how the program was going to affect him and his school. He explained, "Administrators have the responsibility to become informed about curriculum and policy changes, to keep their staff informed of these developments, and to provide the atmosphere, direction, and resources to facilitate change." Therefore, he felt it was his responsibility to educate his staff about the CALM curriculum and to alleviate their fear of it by sending teachers to CALM inservices so that they could gain the knowledge, skill and confidence to implement the program. He stated, "All change is loss. For people to accept change they must first understand why it is necessary, and how it will affect them, and if possible, become involved in it as early as possible." For this principal accomplishing this task meant planning ahead and keeping abreast of change.

In anticipation of some of the administrative concerns that might arise during the CALM information/orientation sessions, the Project Team provided the opportunity for administrators attending these sessions to review and discuss the student learning expectations in the CALM curriculum and to view the resources available at this stage of implementation. They then had the participants return to their small groups to discuss the characteristics and skills of an effective CALM teacher. The objective of this part of the session was to help administrators to define criteria to guide the selection of suitable CALM teachers. The sessions concluded with another practical exercise that was intented to send administrators away with ideas related to how they could go about implementing the CALM curriculum in their schools or school systems. In this exercise administrators, in small groups, developed an action plan that would tailor the CALM curriculum to accommodate the following considerations: the needs and interests of students in their school, the characteristics of their community, available resource support (including community resource people), and finally the creation of an appropriate learning environment.

As a result of these information/orientation sessions and the concerns and issues raised by administrators, the Project Team decided that it would be beneficial to the successful implementation of the CALM curriculum to develop an implementation manual for administrators, counsellors and teachers. The manual, available in April 1988, was a practical guide to administrators that provided information concerning the CALM curriculum and suggested strategies for its successful integration within the existing high school program Sources of support and assistance were also included (*Career and Life Management 20, Implementation Manual for Administrators, Counsellors and Teachers,* April, 1988, p.1). The manual included specific information regarding the selection and preparation of CALM teachers, development of support networks, indicators of an effective CALM curriculum, a list of authorized resources, implementation issues and recommended strategies for dealing with these issues, and finally, curriculum and community contacts for each zone.

The last two phases of the Alberta Education inservice training strategy for those responsible for the implementation of CALM dealt with creating the infrastructure (network of support) for system wide implementation of CALM and inservicing of CALM teachers. The audience for these last two phases were CALM school district coordinators and implementors. The coordinators would be one or two teachers from each school system (designated by their superintendent) who would be responsible for local level inservice. The objective for this phase of inservice was to begin to establish at the local level a network of knowledgeable teachers or consultants who would be able to organize and conduct inservices for CALM teachers and assist them in the implementation of the curriculum. The rationale for the designation of a "CALM Coordinator" and a description of the role is outlined in the CALM implementation manual for administrators, counsellors and teachers:

> Effective implementation involves 'coordinating' the many resources and sources of support which are available within the school system and the community with the needs of the teachers and students. Assigning this responsibility to an individual or team at an early stage is an important first step in the implementation of CALM. This 'CALM Coordinator' could:
> - identify and deal with teacher and administrator concerns
> - identify sources of support within the community including regional offices of the various government departments that have related responsibilities
> - coordinate teacher training workshops
> - encourage in-school support networks involving the CALM teacher,librarian, school counsellor, work experience coordinator, teachers of related courses
> - coordinate workshops or seminars and ongoing information to parents, other staff members and the community
> - facilitate sharing and purchasing of resources
> - act as liaison with Alberta Education [Curriculum Design Branch, Curriculum Support Branch, and the Regional Offices].
>
> (*Career and Life Management 20 Implementation Manual for Administrators, Counsellors and Teachers,* April 1988, p.7)

The CALM Project Manager elaborated on the concept of the CALM Coordinator and the establishment of a support network:

> CALM Coordinators are a kind of curriculum contact person. They provide a channel for information and feedback between Alberta Education and the field. It is an ongoing strategy for ensuring that someone in each system who

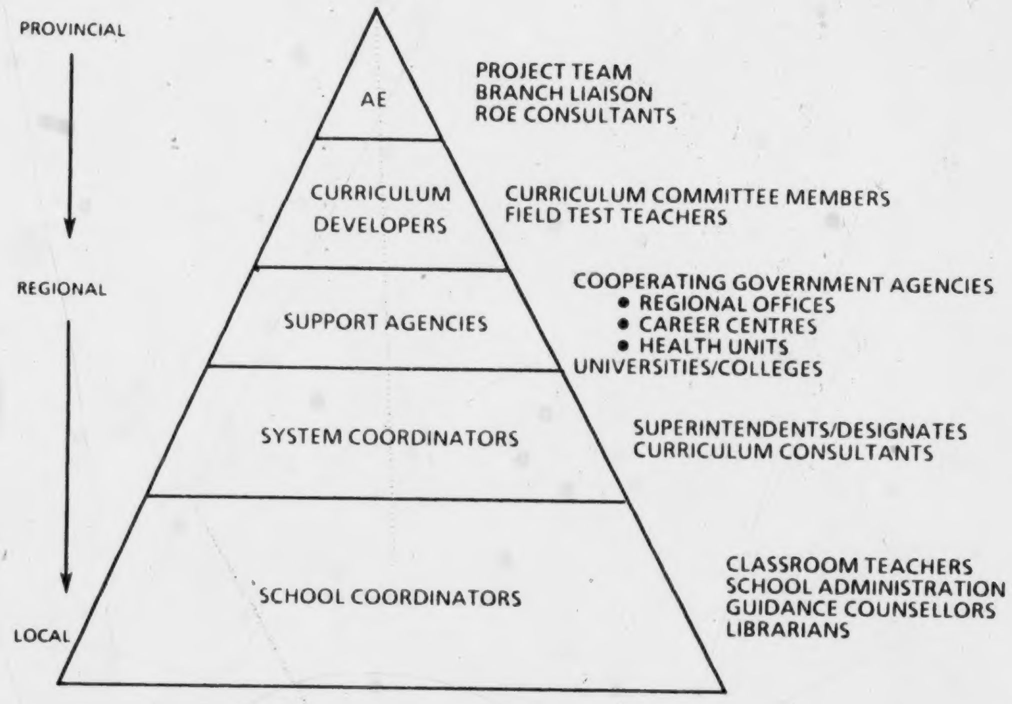
> is designated by the superintendent has some responsibility for CALM. Secondly, by asking superintendents to designate the CALM Coordinator it gets them involved in the implementation of the curriculum and it also gives them a nudge to start the implementation process in motion.

In summary, the Project Team viewed the function of creating an awareness and understanding of the CALM curriculum as part of the process of engendering support for implementation. Therefore, the purpose of the information sessions were to disseminate information regarding the rationale and intent of the curriculum, and to address problems and concerns voiced by the participants, and to have them return to their schools with some conception of possible action plans for implementing CALM.

### Implementation Strategies

The Project Team devised an implementation scheme that was essentially a cascade or pyramid model of implementation (see Figure 2, CALM: Implementation Strategy) in which Alberta Education (Project Team, Branch Liaison, Regional Office of Education Consultants) is at the pinnacle of the model. Their task was conceptualized as overseeing the implementation process and ensuring its continuation, and to establish the basic infrastructure (support, resources and inservice) that would facilitate these processes on a province wide basis. The "cascade" metaphor, adopted by the Project Team to describe its implementation plan, reflects the view that the implementation of the CALM curriculum is a shared responsibility of Alberta Education, the Alberta Teachers' Association, post-secondary institutions, and school districts. The task of the Project Team was to initiate the implementation process, or in metaphorical terms, "start the water flowing." Because water cascades down, the metaphor implies that implementation is the shared responsibility of these other organizations and that their assistance is necessary in order to keep the process flowing. Implicit in this concept of implementation is that teacher preparation and inservice is integral to the implementation process., because ultimately, the classroom teacher must have the knowledge, skills, and resources in order to interpret and bring to life the intent of the curriculum.

**CALM: IMPLEMENTATION STRATEGY**


PROVINCIAL
REGIONAL
LOCAL
AE
CURRICULUM DEVELOPERS
SUPPORT AGENCIES
SYSTEM COORDINATORS
SCHOOL COORDINATORS
PROJECT TEAM
BRANCH LIAISON
ROE CONSULTANTS
CURRICULUM COMMITTEE MEMBERS
FIELD TEST TEACHERS
COOPERATING GOVERNMENT AGENCIES
• REGIONAL OFFICES
• CAREER CENTRES
• HEALTH UNITS
UNIVERSITIES/COLLEGES
SUPERINTENDENTS/DESIGNATES
CURRICULUM CONSULTANTS
CLASSROOM TEACHERS
SCHOOL ADMINISTRATION
GUIDANCE COUNSELLORS
LIBRARIANS

Source: *Career and life management 20: Interim curriculum guide*. Alberta Education, 1987.

In the March, 1987 *Career and Life Management Curriculum Overview* Alberta Education defined its role in the implementation of CALM as primarily that of creating the infrastructure for implementation and curriculum continuation. In doing so they proposed to undertake the following responsibilities: to identify and inform potential participants in the support network; to identify and help train curriculum contacts who are located throughout the province (Field Test Teachers, Curriculum Developers, Health Units, Career Centers, Consumer and Corporate Affairs Regional Offices); to prepare material which could be used by workshop leaders (curriculum contacts) during inservice activities; to encourage post-secondary institutions to provide pre-service and inservice programs; to cooperate with ACCESS to produce a series of videos which could be used for on-site inservice across the province; and to prepare a teacher resource manual which would offer extensive support in terms of lesson planning, student evaluation, and resource use (*Career and Life Management Curriculum Overview,* March, 1987, p.3). The role of the Alberta Teachers' Association might be to encourage specialist councils to deal with CALM and the organization of special CALM workshops or sessions at conferences. The role of post-secondary institutions would be to provide teacher training on an essentially pre-service basis. Since then the University of Alberta has established a "Personal Career and Life Management Graduate Diploma", and University of Calgary offer a graduate course entitled "Introducing the CALM Curriculum." The other Universities and Colleges in Alberta have identified relevant courses that would assist teachers with the development of content background and instructional strategies for teaching CALM.

In general, the implementation strategy adopted by the CALM Project Team can be described in essentially three stages. The first stage was to build awareness and to nurture acceptance of the Career and Life Management curriculum. The target group for this stage were teachers, school and system administrators, Government agencies, and the general public. This process of building awareness and acceptance of CALM was facilitated through province wide information sessions, specialist council workshops, and through the development of print materials such as an implementation manual for administrators, counsellors and teachers, as well as a teacher resource manual. The second stage assumed that there was a general acceptance of the CALM curriculum and that the Project Team could now concentrate on expanding the skills and knowledge of system coordinators, administrators and teachers. For this purpose training sessions for CALM school system coordinators were held in conjunction with Regional Offices of Education. As well an inservice package was designed to assist workshop leaders (CALM facilitators) to conduct local level workshops. The third and final stage of the Project Team implementation strategy involved the evaluating, monitoring and providing on-going support for CALM. This was facilitated by the CALM system coordinators, regional office consultants and the on-going review and updating of the curriculum by Alberta Education (*Implementation of Career and Life Management: Target Groups and Strategies*, 1987).

In an effort to facilitate the implementation of CALM through the three previously described stages, Alberta Education established a network of provincial, regional and local support systems. This infrastructure was based on the premise that "it is more expedient to work closely with a designated few teachers than superficially with CALM teachers from across the province" (Prather, 1988). The "designated few" become the experts in their district and inservice others, establishing a local level support network. The CALM Project Manager explained that the goal was to create a grassroots approach to implementation:

> Teachers are better able to assess local level needs and are more knowledgeable than a regional office consultant with regard to the resources and limitations that they have to work under in facilitating those needs. They can share their experience and expertise in implementing the CALM curriculum with potential CALM teachers and are more empathetic toward the inexperienced teacher's position. These are the reasons why we felt that it was more expedient and beneficial for the potential CALM teacher to have an experienced fellow teacher conduct an inservice for them, and to provide them with assistance and guidance during implementation.

With the Alberta Education cascade model as a guideline, many of the larger districts established a local implementation team and set to work to strengthen the local support structure and to prepare teachers for mandatory implementation in September, 1989. Schools in smaller jurisdictions often waited for the opportunity to have access to workshops established by the larger districts.

### Local Level Implementation

All school system and school administrators and CALM coordinators were provided with copies of *Career and Life Management 20 Implementation Manual for Administrators, Counsellors and Teachers* . In the manual were outlined clearly the important factors that should be considered in developing a local level implementation plan for the CALM curriculum. The manual also included an explanation of the purpose of the CALM curriculum, an overview and outline of the course structure, a discussion of the implementation timeline, credit allocation, course objectives, resource support and costs, and an explanation of the intent of a "process oriented" course. With regard to implementing and administering the CALM curriculum, the manual explained that implementors require the opportunity for ongoing discussion of concerns and issues that arise as the CALM curriculum is implemented. The manual then outlined three suggestions. First, that the administrator and staff should review the curriculum guide and goals of the program to understand how the instructional approaches recommended for CALM might be shared with current subject area specializations (i.e., Personal Living Skills, Business Education, Home Economics). Second, if the school required more than one teacher to teach CALM, then attempts should be made to put together a team of teachers who work well together and who could share ideas and possibly engage in team teaching. Finally, the manual suggested that whenever possible teachers should be asked to volunteer to teach CALM. In the views of the authors of the manual, only those teachers who felt comfortable with the curriculum content and process orientation advocated in the program delivery would be likely to conduct an effective program to students (1988, p.6).

The manual provided directions for the administrator or coordinator responsible for assisting in the preparation of the CALM teacher. It stated:

> The challenge in teacher preparation for CALM is not so much in helping teachers understand WHAT needs to be taught, although this aspect is very important, but in helping teachers to feel confident and comfortable with HOW the course may be presented. (1988, p.6)

To assist teachers in developing this confidence the manual suggested that the teacher should have the opportunity to do the following:

> interact with others who are also teaching CALM; to learn about the program and instructional strategies through well planned inservice activities that are appropriately scheduled over time, and to identify sources of support. (1988, p.6)

The manual also provided direction for the administrator in selecting the CALM teacher. The selection of the CALM teacher was identified as "one of the most crucial elements in the successful implementation of the CALM curriculum" (1988, p.5). The manual outlined key characteristics of a potentially effective CALM teacher and referred to the teacher resource manual for a description of the role and expectations of the CALM teacher.

Finally, the manual discussed local level teacher inservice activities and workshop planning. It informed the administrator that Alberta Education had developed a workshop outline as well as an inservice package developed in cooperation with ACCESS Network. The manual suggested that raising concerns, and selecting and preparing the CALM teacher should be accomplished during the initial implementation period (September,1987-June, 1989) through a series of locally organized workshops that could be scheduled in conjunction with the inservice videotapes which were broadcast by ACCESS Network, beginning in April, 1988. The underlying objective in this approach was to have school systems preparing for implementation well before the September, 1989 mandatory implementation date. The manual also indicated that Alberta Education would provide the administrator or coordinator with a list of people from throughout the province who had experience in conducting inservice sessions on CALM or had taught the CALM curriculum and would be willing to offer workshops or to advise jurisdictions in developing their own workshops. The manual provided a list of people from various geographic areas in Alberta who had assisted in the development or validation of the CALM curriculum, and who would be able to assist with "questions and concerns, provide direction with resources, identify community sources of support, and interpret learning expectations" (1988, p.6). The section on planning local workshops concluded with a discussion of the ACCESS Network inservice videotapes series and information on developing a support network through the appointment of a CALM coordinator. It also provided a checklist of indicators on an effective CALM curriculum and defined the role that teachers, students, parents, the community, the classroom and resources could play in ensuring the success of the CALM curriculum (1988, p.8).

### Local Level Inservice/Implementation Strategies

A CALM program specialist and workshop facilitator explained that the essential component that was implicit in planning local level workshops for the implementation of the Career and Life Management curriculum was that administrators, leaders and teachers had

> the confidence and belief that teachers were *capable* of teaching CALM, and that because of their *professional commitment* to children they would do their best to become prepared to teach the curriculum to the best of their ability, and would be willing to share their skills and knowledge to assist others in the implementation process.

The CALM Project Manager observed that several local level inservice programs, whether they were at the district or school level, adopted the team approach for the implementation of CALM as advocated by the Project Team. The team approach varied from two teachers, to small groups of teachers in a school or area, to a district level in-house steering committee. Diane Field, Supervisor of Home Economics, Health and Family Life with the Calgary

Board of Education, explained that the team approach "capitalized on a wealth of knowledge and expertise and sense of cooperative learning and peer teaching gained from working together. It created a sense of 'team effort' and the feeling that we are all in this together."

Both CALM curriculum supervisors and school administrators identified the territorial stance of teachers as being one of the biggest obstacles to the successful implementation of CALM at the school level. They attributed this to essentially two factors. First, because CALM was interdisciplinary in nature and therefore blended content and skills from a variety of subject areas, it was necessary for CALM teachers to solicit assistance and direction from teachers in other areas. However, "while teachers may recognize that the CALM curriculum ensured that every student would receive much needed information, they also realized that the curriculum came at the expense of other viable programs such as Home Economics, Industrial Arts, and Business Education," explained one principal. He went on to state, "teachers would be more likely to welcome CALM if it didn't mean taking away what they have already worked so hard to develop."

Second, due to the interdisciplinary nature of the curriculum, teachers of the optional or complementary programs were naturally defensive over their subject area content and the viability of their programs due to the priority ascribed to core curricula. One curriculum coordinator explained that "high school teachers will do anything to prevent themselves from being demoted to a junior high or elementary school position. The opportunity to teach CALM may determine whether they stay or go. Consequently, there is a lot of sniping among teachers to determine who will get to teach CALM and under what jurisdiction." Through information/orientation seminars and through the administrators' manual, the Project Team encouraged local implementors to minimize the impact of the implementation of CALM on existing programs, and to attempt to capitalize on the strengths, in terms of knowledge and skills, of various teachers by helping them to work together in the best interest of the students. However, as one government representative on the Steering Committee observed,

> this is not an easy feat during the early stages of implementation because at this point local implementors [teachers and school administrators] have a tendency to miss the "big picture" [how CALM fits into changes in the structure and philosophical orientation of the new directions for secondary education, and the very real societal need for education in subject areas covered in CALM] and to focus on more immediate concerns, such as job security and survival during major change.

A CALM workshop facilitator observed that "there was a sense of insecurity among administrators because they knew that changes were coming, but they were unsure of what those changes might entail and the impact the changes might have on their role and responsibilities."

The Calgary Board of Education was one of the first large urban boards to adopt the CALM curriculum and to assign an implementation team to facilitate the preparation of potential CALM teachers and to coordinate the distribution of materials.

### Calgary Board of Education Implementation Strategy

The CALM curriculum was initially greeted with resistance from the Calgary Board of Education. Some of the Steering Committee members familiar with the Calgary Board of Education, as well as those interviewed in the Calgary system (curriculum supervisors and teachers) contributed much of this resistance to such factors as the mandatory nature of the CALM curriculum, the questionable need for another core course, the perception that the trade-off between well established complementary programs for CALM was too high a price to pay in terms of student choice in optional (complementary) programs, and program and specialist teacher redundancy (e.g., Beauty Culture, Industrial Arts, Business Education). Finally, some trustees felt that the school was outside its zone of responsibility, and that matters discussed in CALM should be left to the family, the church and the community. However, Helen Siemens, CALM Program Specialist and manager of the Calgary Board of Education CALM Implementation Team explained that within the Calgary system there were a number of individuals who had been involved in the development (members of the CALM Steering Committee and Curriculum Sub-Committee) and validation ( three field test teachers) of the CALM curriculum, who were eager to initiate the implementation of CALM in the school system. She explained that these people realized that despite administrative opposition, CALM was mandated and had to be implemented by September, 1989; consequently a great deal of preparation that had to be done to make the implementation of CALM a successful endeavor. Because the Home Economics/Health team at district office had experience in implementing the elementary and junior high Health curriculum and had a member of the CALM Curriculum Sub-Committee on staff, they were appointed the task of managing the implementation of the CALM curriculum.

The first decision that the implementation team made was to formulate, at the board level, an in-house steering committee. The committee was comprised of subject area supervisors, an assistant superintendent, a principal, and various curriculum team representatives. A member of the in-house steering committee explained the rationale behind establishing such a group:

> An in-house steering committee was established to encourage an interdisciplinary focus in the implementation of CALM, and to reduce the "territorial imperative" among subject area specialists that could sabotage the program. The idea was to have departments work cooperatively right from the start, and to establish "Team Effort" as a model for the implementation process. By having curriculum team leaders serve on the committee they became knowledgeable contact people that could in turn educate individuals in the school system regarding the CALM curriculum, informing them of how they could be of assistance in its implementation.

Helen Siemens explained how the in-house steering committee was of assistance to the CALM implementation team:

> The in-house steering committee helped us to determine what we wanted to achieve, how we wanted to see things happen, and what action we might take to make things happen. They viewed implementation as educational marketing, and therefore decided to develop a brochure aimed at students to promote the CALM curriculum, explaining to students what the program is all about and what experienced fellow students were saying about it.

The second major decision the Calgary Board of Education CALM implementation team made was to adopt a grassroots approach to the implementation of CALM. Due to the system's administrative opposition or resistance to the CALM curriculum, the team decided to work directly with those teachers who were interested in becoming involved in the implementation of the CALM curriculum, rather than wait until the administrative opposition was resolved. The implementation of CALM was operating under a restricted time frame, and the team wanted to begin as early as possible (Siemens, 1988). The team began by identifying two stages in the implementation of CALM at the local level. The first was an awareness-information stage: "What is this program all about and how is it organized?"; and the second was a more concrete stage: "How do you implement this program?"

### The Awareness Stage

The Calgary Board of Education CALM implementation team members were cognizant of a feeling of anxiety in the high schools with regard to the implementation of the new CALM curriculum. The team felt that this anxiety was the result of the need for accurate information regarding the rationale and content of the curriculum, and more important, how the implementation of the curriculum would affect the role and job security of the teachers in each school (staffing and timetabling of the curriculum). Consequently, the Calgary implementation team began by conducting general information meetings (beginning in October 1986) for interested administrators and teachers. Upon invitation from school administrators they conducted on site information sessions at lunch hour and during teacher professional development days. Their objective was to disseminate accurate information, to motivate people to become involved in the CALM curriculum, and to encourage schools to begin to plan for the implementation of CALM in the fall of 1989, with hope that every school would have at least one session in place by the fall of 1988 (Siemens, 1988).

The second stage in the Calgary Board of Education implementation strategy was the direct result of the information sessions that the implementation team conducted in the various schools throughout the city. Teachers began to identify themselves as being interested in learning more about the CALM curriculum and possibly becoming a CALM teacher. In response to this teacher interest the implementation team organized after school workshops and information sessions that were held every six weeks. The purpose of these meetings was to provide the opportunity for potential CALM teachers to get together with experienced teachers (field test teachers and curriculum validators) to share ideas and concerns and to begin to establish an informal network among themselves. Because the Calgary Board of Education elected not to allocate additional funding for a CALM coordinators position, "teachers came to these informal 'network' meetings because of their interest in providing leadership in their schools in the area of CALM" (Siemens, 1988). Some of these teachers eventually volunteered or were selected for coordinator positions (without monetary compensation). Consequently, the implementation team was able to begin the implementation of CALM with teachers who demonstrated an interest and commitment to the CALM curriculum. From this group emerged potential CALM teacher leaders and the foundations of an infrastructure of peer support for the implementation and continuation of the CALM curriculum.

### The Implementation Stage

The third stage in the Calgary Board of Education implementation plan was to conduct an intensive inservice program for potential CALM teachers. The inservice program consisted of seven, two and a half hour sessions that were conducted after school hours. The sessions were designed to be very practical in nature, and the inservice leaders modelled specific teaching strategies (i.e., process teaching strategies and group process strategies). Helen Siemens explained the rationale behind adopting a "hands on" approach:

> After working with the implementation of the elementary and junior high Health curriculum we realized that teachers are generally concrete-visual learners. They need concrete activities so that they know that they have accomplished something. That is why we go through the CALM curriculum in a very thorough and concrete way where the teachers actually participate in activities, develop a program sequence, write lesson plans and develop action plans.

The implementation team also decided to take advantage of the inservice package prepared by Alberta Education in cooperation with ACCESS Network. Helen Siemens, the Calgary Board of Education CALM Implementation Team Manager, had been instrumental in designing the *Career and Life Management Inservice Guide* that was to be used by teachers and workshop leaders in conjunction with the ACCESS videotapes. The Calgary Board of Education inservice sessions followed a specified format, always incorporating an informal "socialization time" where teachers could discuss among themselves experiences and concerns, exchange ideas, and establish contacts.

Unlike teachers in established departments in a school in which fellow subject area teachers can share ideas and work, the CALM teacher at the early stage of implementation was still relatively alone in the school. Based on her experience with implementing curricular change, Siemens held the view that the opportunity for informal social interaction among fellow CALM teachers at after school sessions was important in giving them reassurance that they were not going through this experience alone. In addition, by adopting a team approach in the implementation of CALM in the school, CALM teachers could capitalize on the knowledge and expertise of various subject area teachers, and could share the burden of developing lesson plans and identifying resources and support. A CALM teacher from a large Calgary high school explained the advantage of the team approach:

> We have developed an in-school steering committee that includes a CALM facilitator, our research librarian, and two teachers. Between the four of us we have subjected ourselves to almost every inservice offered in the city. We have amassed all of material that we had collected and filtered through it, selecting that which we thought was really important and relevant to our students. We then conducted an inservice session during a professional development day and an organizational day for teachers on our staff who were interested in teaching CALM. Through this core team approach we have saved our fellow teachers from the burden of having to attend all of those inservice sessions themselves, and from the the task of putting together CALM resource materials.

In conclusion, the implementation of the Career and Life Management curriculum in the Calgary public school system was characterized by a number of factors. First, the

Calgary Board of Education is a large urban board that had the resources to allocate funding as well as staff to conduct board funded teacher inservice sessions, to coordinate the development of a peer support network, and to appoint an implementation team headed by a CALM curriculum specialist. Secondly, teachers in the Calgary public system had the advantage of working with individuals who had served on the CALM Steering Committee and the Curriculum Sub-Committee, and therefore had intimate knowledge of the philosophy and goals of the curriculum, as well as direct access to Alberta Education with regard to developments or changes in the CALM curriculum. Finally, some of the Calgary Board of Education CALM teachers felt that they had benefitted from having a knowledgeable and dedicated CALM implementation team that took into consideration teachers' needs but reinforced the underlying purpose of the implementation of the CALM curriculum, which was to affect students' lives. One Calgary CALM teacher commented on her experience with the Calgary implementation team:

> Helen Siemens supported us 100 per cent. When we panicked she was really good at getting us back on track. She helped us to determine what we were going to do next, what we were going to teach, how were going to go about doing it, and then together we sat down and actually planned it all out.

Siemens concluded that when implementing a new program "the bottom line is that schooling is for the purpose of impacting student's lives. If the program does not have a positive effect on kids it is of little value." However, she went on to explain that "teachers are instrumental in ensuring that CALM does have a positive impact, so they must be confident, capable and prepared!"

### The Red Deer CALM Workshop: A Local Initiative

Lindsay Thurber High School in Red Deer was involved in the field testing of the CALM curriculum. The field test teacher, Bennita Bannerman, was very impressed with the content of the CALM curriculum and with her student's enthusiastic response to it. Having brought up five teenage children, and having been a community health nurse Bannerman viewed CALM as being in tune with the needs of today's teenagers. She explained:

> I am very enthusiastic and committed to CALM because it is a reflection of my own belief system with regard to educating children, and the curriculum was fulfilling a recognized need. Students and parents felt very strongly about the program, and I realized that for once our educational system was on the right path!

Bannerman's became an advocate of CALM and appeared on local television and radio talk shows to promote the curriculum. After a number of teachers at her school began to express interest in teaching the CALM curriculum, Bannerman realized that she would have to conduct an inservice for at least ten interested teachers. Since Alberta Education was advocating a grassroots (local response) approach to inservice (peer teaching) and the development of a local support network, Bannerman, with the support and assistance of the principal, decided to organize an inservice activity for approximately fifty teachers from Red Deer and the surrounding rural area. Alberta Education sponsored the inservice because it was the first step in formulating the local level infrastructure and network for the implementation of CALM, and could serve as a model for future locally initiated workshops. In addition, the workshop would also serve to prepare a number of rural teachers that might otherwise have difficulty gaining access to inservice sessions.

In August 1987, Lindsay Thurber High School organized and hosted a two day workshop on CALM that focused on information, establishing local support networks, and finding resources. Bannerman, the principal and the CALM Project Team arranged for guest speakers for every theme in the CALM curriculum. The speakers provided an overview of a particular theme, conducted an activity that teachers could use with their students, and distributed a sample lesson plan. In addition, all available resource people from central Alberta were invited to set up displays and distribute information in an attempt to provide teachers with the opportunity to make contact with these resource-support agencies. Finally, a parent-student panel was arranged to discuss their views on the CALM curriculum and to answer questions. Bannerman made the following observation:

> When people have gone through the growing pains of developing a new program, which takes a great deal of time and effort, they become very protective of it. They want to ensure that the program is successful and that the right kind of person teaches it. This was the case with our panel discussion. We had students and some of their parents as representatives of a cross section of student types in our school. The parents discussed how CALM was important to students and some gave testimonies as to how it helped their family life. The result was a kind of crusade for CALM. Those that were skeptical of CALM seemed more prepared to listen to students' perspectives as they are viewed as being valid and sincere. They are based on personal experience!

From the perspective of the workshop organizers the underlying purpose of the inservice session was to motivate teachers, and to provide them with materials such as manuals and resources, so that teachers would come away feeling that the session was worthwhile, and more importantly, that the CALM curriculum is worthwhile and that it meets a real need (Bannerman, 1987). "If teachers believe in CALM and they believe in doing what is in the best interest of children, then they will be motivated to do the best job they can in implementing the curriculum, and their enthusiasm will influence the class climate and will have an impact on their students" (Bannerman, 1987). The effectiveness of the Red Deer CALM workshop on teacher motivation and preparation for teaching, and its impact on their perceived value of the curriculum are areas that need to be assessed before determining if this workshop should serve as a model for future inservice sessions. However, at this point in data collection such an evaluation had not been conducted by the researcher nor by the workshop sponsors.

### Inservice in Rural Alberta

In the previous two sections CALM inservice strategies in two urban districts were discussed. In large urban areas resources tend to be more abundant in terms of dollars, qualified staff, and community agencies that can assist in the implementation of new programs. However, the implementation of new programs poses a number of problems for the geographically isolated schools in rural Alberta. The Deputy Minister of Education explained that the Department of Education recognized this problem and attempted to deal with it in an efficient and cost effective way utilizing distance education technology. The CALM curriculum was the first program to be selected by Alberta Education to make use of the ACCESS Television Network to create awareness and understanding as well as to provide inservice education for prospective CALM teachers. However, a number of rural school administrators and teachers identified additional factors that can complicate curriculum implementation in rural areas. First, in some schools there are often only one or two teachers for each subject area, and classes may consist of split grades which limit the opportunity for teachers to develop a team or committee to deal with the implementation of the new curriculum. In addition, due to the geographic distance among neighboring communities an informal inter-school committee also poses difficulties. Second, many rural schools do not have the resources in terms of staff or finances to conduct local workshops or to provide adequate funding for teacher release time to travel to urban areas for workshops. Third, rural areas may not have immediate access to resource people (i.e, ADDAC, Canadian Mental Health and various referral services) to create a support network. A CALM teacher commented: "We are already burdened with heavy workloads because we may teach in a number of subject areas and we are expected to be involved in extracurricular after school activities, as well, we must balance our work with our personal life and family commitments." Thus, some rural teachers have difficulty in finding the time in their "after school life" to gather resource materials and establish support contacts. A principal commented that "because of low student enrollment and limited staff, it is difficult for rural areas to offer all of the courses that students may require to graduate with a general diploma. Consequently, many students have to rely on completing their diploma requirements through correspondence courses." The result is that the implementation of CALM often met with resistance in rural Alberta.

## The Alberta Education and ACCESS Network CALM Inservice Package

Alberta Education and the ACCESS Network developed a series of seven video programs and an inservice guide to comprise an "Inservice Package" directed toward locally developed teacher training workshops. The package provides a step by step guide to assist the workshop leader in planning a series of teacher inservice sessions on CALM. The videotapes highlight student learning expectations defined within the core curriculum, model effective instructional strategies, and present the perspectives of teachers and students who were involved in the course in 1986-97 (*Career and Life Management Inservice Guide,* 1988, p.2). The *Inservice Guide* was designed to be used as a leader's guide to facilitate workshops dealing with CALM, or as a self-study resource to help educators acquire information about teaching CALM. The guide includes suggestions for "organizing workshops, 'hands on' and 'take home' workshop materials, transparency masters, and activity pages for workshop or classroom use" (*Career and Life Management Inservice Guide,* 1988, p.2). Together the videotapes and inservice guide comprise the "Inservice Package." The objective in designing such a package was to encourage schools and school systems to conduct their own inservice training workshops and to integrate the videotapes into locally developed inservice sessions.

The CALM Project Manager sent a letter to all superintendents requesting the appointment of CALM Coordinators and informing them of the availability of the inservice package as well as of the dates of the broadcasting of a series of seven inservice workshops. All schools were then informed of the ACCESS Network broadcast, and advertisements were placed in local newspapers and TV guides across Alberta. Teachers and librarians were encouraged to tape the broadcasts for later use at professional development days, at orientation sessions after compulsory implementation, or for review by individual teachers. If it was not possible for schools to tape the ACCESS Network broadcasts, they could order copies of the video tapes directly from ACCESS after the initial broadcast was completed

(*Career and Life Management Inservice Guide*, 1988). Alberta Education prepared a recommended program outline for local inservice workshops that would be participating in the ACCESS Network broadcast and encouraged them to join in a thirty minute "phone in" session that would address local issues and concerns.

**Reaction to ACCESS Network Teacher Inservice Broadcast**

The initial ACCESS Network broadcast of the CALM teacher inservice series was received with mixed reactions. Many of the negative reactions expressed by school administrators in both formal and informal conversation with the researcher were based on the view that Alberta Education should be responsible for the development and funding of inservice sessions for teachers, and that these videos were not an acceptable substitute for provincially sponsored inservice sessions. Three out of the seven principals interviewed felt that April, 1988 was a poor month for the initial broadcasting of the CALM inservice program because many school administrators had not yet made decisions regarding the scheduling of fall courses, nor had they determined staffing needs for the next year. Thus, many teachers would not yet know if they would be teaching CALM in the fall. These administrators felt that June would have been a more appropriate month for the initial broadcast. With regard to the timing of the CALM ACCESS Network broadcasts, one administrator pointed out "we are not going to implement CALM until the mandatory time -- September, 1989, and therefore, we will not concern ourselves with teacher inservice until the fall of 1988, or even Spring of 1989." Another administrator who made the decision to begin teacher preparation in the fall of 1988, decided to tape the broadcast sessions and to then integrate them into the locally developed inservice activities that would be conducted in September or October, 1988. He felt that this would also give staff time to determine how best to use the videotapes. As a consequence of these variations in school systems decisions as to when to implement CALM, arrangements were made for the rebroadcasting of the whole inservice program through the ACCESS Network during July and August, 1988 and again during March and May, 1989.

Another major problem discussed by the Project Team and the Steering Committee was how to develop an inservice package that would be flexible enough to adapt to the local needs and characteristics of each school and at the same time ensure that there was some degree of continuity in the structure and content of the local level workshops. They felt that there were essential skills and knowledge that potential CALM teachers should possess in order to conduct a successful CALM curriculum (*Career and Life Management 20, Implementation Manual for Administrators, Counsellors and Teachers,* 1988). Consequently, the "Inservice Package" (videotapes and inservice guide) was designed to be used in a particular way. The ACCESS Network broadcast was designed to initiate the inservice process and to serve as a possible model for the development of local inservice sessions.

Teacher response to the ACCESS Network broadcasts varied depending upon the extent of their knowledge about the curriculum and their involvement in its implementation. In essence, their responses were a reflection of their different levels of need with regard to teacher preparation. For example, some of the teachers in the Calgary Board of Education expressed frustration with the ACCESS broadcast. These teachers were involved in a series of locally developed inservice sessions that were initially designed to link up with the ACCESS broadcasts. In general, their frustration was rooted in the feeling that they had already made a commitment to CALM by devoting their time to attend after school inservice sessions. They felt that they were beyond the "awareness stage" and did not need to be introduced to nor sold on the virtues of the CALM curriculum. One teacher commented:

> The TV broadcasts created a sense of distance, and the sessions came across as a kind of telethon for CALM, with people advocating and endorsing the program. It was too "high sell" for teachers attending the inservice because we had already "bought into" CALM as evidenced by our attendance at these sessions.

Another teacher described the videos as being "too information oriented." She felt that teachers that are past the awareness stage attend inservice sessions expecting to attain information, skills and activities that they could use in the classroom. Inservices should help teachers to "determine whether or not they want to be, or are suited to being a CALM teacher," commented another teacher. Finally, a CALM coordinator and workshop facilitator used the following simile to describe planning a teacher oriented inservice session:

> It is simple. Planning a teacher inservice session is like planning a dinner menu. They want an appetizer (introduction, orientation), then their meat and potatoes (something concrete, something with substance), and finally dessert (conclusion, something to think about). It can't be bit and blurb scenarios, it must be the completion of a thought process.

In response to teacher reactions to the ACCESS Network broadcast, the Project Team decided to revise the program format for rebroadcasting the sessions in the summer of 1988. They found audience response to the "phone in" portion of the program was low. People did not seem to have the need to call in and to interact. In the next broadcast session they planned to have a panel of teachers, students and parents for each theme and to have them hold an on air discussion of issues related to the implementation of the CALM curriculum. In the initial broadcast they had a guest and a host for each segment as well as a fifteen minute prepared text. The host and guest would usually interact. To stimulate more discussion this format was replaced by a guest panel, and the sessions were longer in length (Prather, 1988). At the time of data collection, Alberta Education had not yet solicited the reaction of teachers who had watched the ACCESS broadcast independently ( i.e., not participants of a local developed inservice group), and therefore could not yet assess its impact on teachers in geographically isolated areas.

## SUMMARY

The CALM curriculum development process took place in an environment characterized by politcal change, economic restraint, and changing directions for secondary education programs. The actual curriculum writing was directed by an interdisciplinary Steering Committee that worked as a team, sharing their knowledge, experience, and expertise to define a common vision and goal for the curriculum. The process of building a commitment to, and an understanding of the curriculum was characterized by what Steering Committee members referred to as "educational marketing." Educational marketing involved promoting CALM in this positive manner, and at the same time providing the opportunity for the recipients of this information to raise issues and discuss concerns that they had regarding the implementation of the curriculum. During these same sessions the participants were encouraged by the Project Team to attempt to develop ways of addressing or resolving issues and concerns that had been raised.

The Project Team encouraged a grassroots (local level) response to the development of the infrastructure necessary for the support and continuation of the CALM curriculum. Inservice was essentially to be the responsibility of local level administrators. Alberta Education provided various resource manuals for teachers and administrators to assist in selecting and preparing prospective CALM teachers and in planning for the implementation of the curriculum at the local level. In cooperation with the ACCESS Television Network they also created a series of video tapes and an inservice manual for use by teachers independently, or in conjunction with provincial ACCESS television broadcasts, or during locally developed inservice sessions. Individuals (teachers and administrators) who capitalized on the direct guidance and support from the CALM Project Team tended to be those that elected to become involved in the early implementation of the curriculum.

# Chapter 6

# IMPLEMENTATION OF THE CALM CURRICULUM

The purpose of this chapter is to examine the critical threshold phase in the implementation process in which school administrators made the decision whether or not to implement the curriculum before the mandatory date. Significant factors that influenced administrators' implementation decision and the techniques and strategies they employed to make the curriculum operational are examined. Finally, the chapter provides a synthesis of various administrator's philosophical positions regarding leadership and the management of change.

Data on which this chapter is based were collected through in-depth interviews with seven principals, four School Board CALM Curriculum Supervisors and the CALM Project Team Manager. At the time of data collection all but three of the principals had the CALM curriculum implemented in some form in their school; however, in most of the schools curriculum implementation was still in an experimental stage in which logistics of implementing in the most effective manner were still being worked out. Consequently, the analysis is more a reflection of administrators' intents with regard to implementation than a description of what they actually did in the implementation process.

## Factors Influencing Implementation Decisions

The decision of when to become involved in the implementation of a mandated curriculum usually is not a school board or school administrator decision. However, in the case of the CALM curriculum, school boards were given a number of opportunities to become involved in early implementation. Teachers or administrators could serve on the CALM Steering Committee or curriculum sub-committees; could participate in pilot testing the curriculum, resources and custom published textbook, or could volunteer to implement the curriculum on a voluntary basis before the mandatory date.

When the seven principals who were interviewed were asked to respond to the question "What factors influenced your decision as to when to become involved in the implementation of the CALM curriculum?" the responses appeared to be a reflection of a philosophical position regarding leadership, planning and the management of change. On the basis of these interviews a number of themes were identified.

## Philosophical Positions on Implementation

Those administrators who had made the decision to become involved in the early implementation of the Career and Life Management curriculum tended to share similar views regarding the management of change. Their position is best summarized in the words of one principal who stated, "We live in a rapidly changing society. The management of change is a *skill* to be mastered." By these principals, the implementation of the CALM curriculum was perceived as an *opportunity* and a *challenge* for administrators, teachers and students. The curriculum was a challenge for administrators because it forced them to review their personal philosophies of education and schooling. This was evidenced in their discussion of whether the content of the CALM curriculum should be dealt with in the school setting, or whether it ought to be the responsibility of the family, the church or some other government department or institution. In attempting to fit the CALM curriculum into the school timetable, some administrators were faced with the task of eliminating existing programs to make room for CALM. In doing so they found themselves re-evaluating the predominant values in and priority of the existing programs offered in the school. Some principals realized that they were already addressing the CALM curriculum through a number of existing programs and seminars, and were therefore reluctant to support the implementation of CALM. Other school systems, such as Catholic districts and at least one academic private school, wanted to modify the CALM curriculum so that it could be taught within a particular philosophical framework. Finally, other principals believed that there was a clear need for a curriculum like CALM and readily supported its implementation. For them the challenges included selecting the appropriate teacher, fitting the curriculum into the existing timetable, and allocating funds to support implementation.

Second, the implementation of CALM was viewed as a challenge and an opportunity for teachers to become involved in the initial stages of implementing a new curriculum, as well as to have some impact or influence on its development. Implementation was perceived as an opportunity for them to develop another area of expertise and to emerge as leaders in a new field. A CALM teacher commented:

> I initially became interested in the CALM curriculum because of my concern with protecting my Personal Living Skills program. However, when I saw the curriculum I realized how relevant and necessary it was for our high school students and therefore I wanted to become involved in teaching it. The bonus for me was that I felt I needed a change in my teaching objectives and career plans; CALM provided me with that opportunity!

CALM was also viewed by principals as an opportunity to recognize and reward teachers with exceptional teaching skills (in process teaching and critical thinking) and good rapport with students by assigning them the responsibility of teaching a new curriculum. A principal explained this perspective by saying, "I set up the appointment of new programs as a plum, a position reserved for the outstanding teacher who is ready for a challenge. I personally ask a teacher to teach a new program as a form of honour and recognition."

Additionally, the implementation of CALM was viewed as an "opportunity for students to engage in a course specifically designed to address their concerns regarding careers, human sexuality, well-being, and coping with emotions," commented one Steering Committee member. Based on her experience with CALM, one teacher explained how the curriculum benefited students: "the curriculum encouraged students to build peer support and to look to other resources in the community to help them answer questions and resolve problems." While certain dimensions of the curriculum are offered in other optional courses, a member of the CALM Curriculum Committee pointed out that "CALM is the first course in which every student has the opportunity to engage in reflective thinking about themselves, where they are going, where they want to be, and how they are going to get there."

## Areas of Consideration

In coming to terms with the final decision regarding when to become involved in the implementation of CALM, the administrators interviewed in this study appeared to go through three non-sequential phases. Each phase involved certain factors or questions that needed to be addressed before the administrator could make the final decision. One phase involved an intellectual, rational examination of the CALM curriculum. They considered such questions as: 1) Does this program meet a real need in our school? 2) What are the costs and benefits of implementing this program before the mandatory date? 3) What are the constraints, options and sources of support for the implementation of the program? For example, one principal took the position that it would be more expedient for the staff to wait for mandatory implementation. He explained:

> We have decided to wait until September, 1989, the mandatory implementation year because we have many concerns regarding the implementation of the CALM program and other *Alberta Secondary Education* policy initiatives. We would rather wait until Alberta Education has all of the resources developed, tested, and available, and all of the kinks worked out of the program before we implement it.

Reflecting upon the costs and benefits of becoming involved in the early implementation of CALM another principal stated:

> In a small rural school it is difficult to coordinate an optional year of CALM because of our low student enrollment, tight budget, and limited teaching staff. Essentially because of timetabling constraints, it is more efficient for us to offer CALM in the mandatory year when everyone has to take it.

The majority of administrators who elected not to become involved in the early implementation of the CALM curriculum did not go beyond this phase in the decision-making process because at this point it was apparent that in their school the early implementation of CALM was not feasible. Another consideration in the administrators' decision-making process appeared to involve fitting CALM into their vision for the future direction of education in their school, and determining how best to communicate and induce support for, acceptance of, and involvement in that vision. One of the CALM curriculum supervisors for a large urban school board observed:

> There is a need for implementation leaders to philosophize and reflect on a personal level as to what they want to accomplish. Good administrators have a goal in mind and know what they want to accomplish in their schools and how they want to see things actioned. Their goal is to convince others to adopt this vision or plan-- that is leadership.

Another CALM curriculum supervisor, responsible for providing inservice education for administrators and potential CALM teachers, alluded to the problem of intellectual and emotional commitment to the implementation of CALM, and to the ability of administrators to put ideas into action. She reduced the problem to one of leadership style and motivation:

> We have administrators and teachers who are dedicated, innovative movers and doers, and then we have those that are talkers and delegators. They are the ones that become involved in an innovation for the status and recognition. Their goal is to do as little as possible and still get the credit. It is really a matter of who can get the most support and can be the most vocal-- the innovators and doers, or the talkers and delegators?

She went on to explain why, in her experience, some administrators are reluctant to become involved in the early stages of implementing change.

> Essentially, they are afraid of innovators because they are intimidated by them. Their actions make them question their capabilities and self worth. In defense they try to block innovators and their efforts. The winners in this struggle are those who are most politically astute and politically connected. That is, they know who to talk to, what to say, and when to say it . Unfortunately these people tend to be the talkers rather than the doers, and when they do win the battle they do not personally become involved in the innovation, rather, they end up delegating the task away.....Once the fireworks of initiating involvement in an innovation are over, there is no real commitment to ensure the continuation of that initiative.

In support of this observation a high school principal concluded that "the shape and direction of a change is essentially contingent upon how strong the leadership is in any one area."

Another consideration in the decision making process involved administrators addressing questions regarding the logistics of implementing the CALM curriculum. For some administrators this task involved the development of an implementation plan, and communicating to their staff the perceived significance and value of the CALM curriculum. One principal viewed this as a leadership task:

> Much of the problem in implementing a new program is selling the ideas and clarifying people's perception of what the program is all about so that we have a common understanding of the purpose and intent of the program. It is my responsibility as principal to be informed and to inform my staff, and to then provide the atmosphere for acceptance, and the facilities and resources for implementation.

However, not all principals elected to deal with the issue of whether or not to become involved in the implementation of CALM before the mandatory date. In some cases this lack of discussion or consideration left teachers with little direction regarding when and how the curriculum would be implemented; they were left with the impression that the curriculum was viewed by the administration as one of low priority. One teacher explained that for those teachers who realized that they may have to teach CALM when the mandatory time cames, the question of the logistics of implementation posed some real concerns:

> Some principals have refused to come to grips with the whole issue of CALM and have done nothing about its implementation. It is then up to the teacher who will probably have to teach the course to find his or her own inservice sessions in order to become prepared to teach the curriculum. It also becomes the teacher's responsibility or burden to keep the principal informed. This kind of principal tends to assume that because we as teachers are professionals that we will handle it, and often he or she is right. In the end teachers are accountable for the quality of instruction in the classroom!

A CALM Curriculum Supervisor explained how some teachers coped with the lack of administrative planning and support:

> In some cases teachers who had already heard about the new CALM curriculum and were interested in becoming involved in it had to approach their principals and convince them of the need for such a program. In some cases these teachers began to arrange their own inservice sessions and to attend CALM workshops without administrative support.

## Broad Factors

In the final analysis, the seven principals interviewed perceived two broad factors as significantly influencing their decision regarding involvement in the early implementation of CALM. The most significant factor appeared to be a personal philosophy of leadership and of the management of change. In general, they perceived the management of change as a skill to be mastered because "change is an ever present and inevitable phenomenon." Therefore, as leaders, they viewed it as their responsibility to prepare staff and students to cope with change by engendering a positive attitude toward change, by encouraging and rewarding innovative behaviour, and by attempting to have staff become involved, whenever possible, at the "ground floor" of an innovation. Considerable importance was attached to teachers' having the opportunity to influence the development of the curriculum, growing as the content and philosophical basis crystalized, and finally, keeping the remainder of the staff informed of these changes. Their underlying goal was to be on the "cutting edge" of developments in education. As one principal declared: "Our motto is 'nothing but the best', or 'the pursuit of excellence'"; that was the expectation he set for himself, for staff, and for students.

A second factor was that of the importance of adopting a proactive, as opposed to a reactive, approach to managing the implementation of change. Principals explained that by adopting a proactive approach they could plan to take advantage of the opportunity to implement CALM on a voluntary basis. "By doing so," explained a principal of a private school, "it gave me and my staff an opportunity to experiment with the program and to work out the best way to implement it in our school." A further advantage of proactive planning, highlighted by a CALM Curriculum Consultant, was that it gave administrators time "to identify problems and work out possible solutions," and it gave teachers the "opportunity to develop a sense of ownership in the curriculum and to attain the necessary skills, knowledge and resources to implement it." She added that a proactive approach also permitted each school to work out the logistics of implementing CALM on a small scale, working with committed teachers, and then gradually implementing it on a full scale basis in time for mandatory implementation. During this period the administrator and the core CALM teachers involved in this experimental phase had the opportunity to develop a vision or plan for the orderly implementation of the curriculum, giving the remainder of the staff a sense of direction and control. The themes of proactive planning and keeping on the "cutting edge" of change merit a more detailed examination.

## Proactive Planning

The concept of being on the cutting edge of educational change and innovation naturally implies the need for proactive planning. The term "proactive" relates to making decisions based on longer term instructional or program goals rather than on immediate circumstances. Proactive planning requires anticipation of problems, future projections of educational and demographic trends, a sense of vision and defined goals (*On the Cutting Edge*, 1988). Theoretically, when school administrators make the decision that their school will attempt to be on the cutting edge of change, transforming the decision into an action plan ought to involve not only long term planning, but also the consideration of the school's core values and goals that will provide direction in bringing the plan to fruition. In the case of the seven principals who were interviewed, those opting to become involved in the early implementation of CALM seemed to have a strong sense of a plan, a purpose, and a vision for their school. When asked "what factors influenced your decision as to when to implement CALM?" their responses tended to begin with a philosophical statement and a comment about the need for planning. For example, a principal of an academic private school explained that his school had a philosophy of "getting in on the ground floor of change." Because they operated on a five year plan he felt it was necessary for them to become involved in changes as early as possible so they could effectively work them into their plans. He stated,

> We view our school as a University prep school and therefore we have few options and little flexibility in scheduling programs. Thus, what we do offer in terms of program choice is carefully selected to conform to our purpose and philosophy, and must be of high calibre and challenging to our students.

In contrast, another principal of a large urban high school explained that because his school had a relatively stable population he could operate on a one year plan. As principal he believed in delegating responsibilities and decisions to the appropriate level. When Alberta Education distributes a schedule for the implementation of curriculum changes, he "plans with department heads for the purchase of materials for those new programs. The decision as to whether or not to pilot a new program is left up to the department heads and teachers, and the assignment and scheduling of programs is left to the assistant principal."

A principal of a large urban high school viewed his educator role as that of an idealist. He defined an idealist as "an individual who helps others to be prosperous." Further, he explained that his role as educator and principal was to "bring out the potential in my staff and students, encouraging them to challenge themselves. When I see opportunities for my staff and students to be challenged and to experience growth I encourage their involvement." He viewed the implementation of CALM as such an opportunity for some of his teachers and students, and therefore made plans for the staff to become involved as early as possible.

Another principal supported the need for early involvement in the implementation of CALM. "To effectively implement a new curriculum," he explained, "requires planning and the anticipation of its impact on staffing, budget, and student program choice." In his school they "attempt to develop a vision so that [they] have an orderly sequencing of implementation, and have worked out the mechanics of how [they] are going to introduce the new program and who is going to be responsible for it." In his experience this planning process requires that they start early so that they have time before the mandatory implementation date to work out the imperfections and problems, and to focus on communication with staff. He concluded "to accept change teachers must understand it, realize why it is necessary, and how it will affect them; therefore, it is necessary for us to become involved in the planning and implementation process as early as possible."

On the basis of these statements, it is apparent that these principals view early involvement in the implementation of an innovation as being integral to being on the cutting edge of change. Planning, goals, and the well- being of teachers and students are also important considerations in making the administrative decision regarding when to become involved in the implementation of CALM. Another significant factor that influenced principals' decision to become involved with the early implementation of CALM was their general attitude toward change. One principal who was opposed not only to the implementation of CALM, but also to many of the *Alberta Secondary Education* policy initiatives, based his opposition on his experience with educational change:

> Having been in education for 28 years I have seen education go in cycles. It begins with a philosophical position and eventually comes back to that original position. This cyclical nature is frustrating for those of us who have been in the business for a long time. It makes us cynical and skeptical of change. No doubt that some changes are valid, but it seems that whenever Alberta Education creates a curriculum review committee, the members feel obligated to find some need for change and to therefore initiate changes!

This principal elected to wait to implement CALM until the mandatory year. Like other principals, he wanted to wait until Alberta Education had tested, experimented, and worked out the details of the CALM curriculum, ensuring that all the resources would be available and implementation problems resolved. In contrast, another principal, supportive of the implementation of CALM, explained why projecting a positive attitude toward change is necessary for successful implementation:

> Teachers and administrators are essentially allergic to change. Sometimes they need a little stress or pressure to keep them motivated and challenged. As principal it is important for me to project to the staff and students that a change is worthwhile and of priority. It is an attitude, but it must also be evident in my actions. I try to discourage unconstructive negativism or sour grapes from my staff. Instead, I try to encourage them to accept change as being positive and a challenge. It is an opportunity for us to make the best of it and get something first class off the ground.

This principal had the school not only involved in the pilot testing of the CALM curriculum, he and the school's CALM pilot teacher were also instrumental in hosting a weekend CALM inservice session for potential CALM teachers in the region. The teacher and the students also became actively involved in promoting CALM on the local television and radio station talk shows, as well as at regional administrative meetings.

In summary, those administrators who elected to become involved in the early implementation of CALM did so primarily because they believed in the content and value of the CALM curriculum for high school students. They also expressed a personal philosophy to the effect that change can be beneficial and that the experience can be enhanced by having teachers become involved in the implementation process as early as possible.

## Operationalizing the Implementation Decision

Once the principals had made the decision to implement the CALM program, they then developed an implementation plan and identified appropriate strategies to make their decision operational. Approaches adopted by the principals had several different facets.

### Early Involvement

A high school principal remarked that "change is seldom effective unless those people directly affected by it are given the opportunity to become involved in bringing about that change." Consistent with this remark, principals and CALM teachers identified a number of benefits of becoming involved in the early implementation of the Career and Life Management curriculum. For example, they suggested that early involvement provides teachers and administrators with the opportunity to become familiar with the curriculum, to experiment with how best to implement it, and to make necessary adaptions to suit the needs of students. From her experience with implementation of curricular change, a CALM coordinator explained that teachers and administrators need time to experiment with a new curriculum and to develop a sense of ownership. She felt that "by having the opportunity to experiment with a new curriculum before the mandatory implementation date helped to take away the stress of dealing with a prescriptive mandated curriculum." For teachers she felt that an "experimental phase gave them the chance to work out the bugs in the curriculum, to seek out necessary assistance, resources or support, and to adapt it to the needs of the students." For administrators, she saw this phase as an opportunity for them to work out scheduling problems and to identify additional CALM teachers. Finally, early involvement could benefit the staff in general by keeping them up to date with the implementation of *Alberta Secondary Education* policy initiatives.

A CALM coordinator in a private school indicated how this experimental phase was used. He explained that because the school deals with a very select group of students, CALM had to be adapted to be flexible enough to meet the needs of every student yet still include the mandatory parts of the curriculum. During the voluntary phase of the implementation of CALM they held a "pre-CALM", non-credit course wherein teachers were introduced to CALM and its philosophical orientation, and then allowed to experiment with its various themes. After a specified time period they all met to review and to evaluate what they had done and what they had learned through the process. They then compared this with the mandatory CALM curriculum and discussed how they could move toward it. During the next round they taught more directly to the curriculum.

## Team Approach

Another benefit of the early implementation of CALM identified by a number of coordinators and curriculum consultants was that this provided them with the opportunity to work with a small group of competent and committed teachers, to experiment with the implementation of the curriculum, to identify or anticipate possible implementation problems, and to search for solutions to those problems. This group was then able to work as a team to develop an implementation plan that worked in a particular school or school district, and to then share this plan with other teachers and the larger system. In other words, some administrators used this opportunity to develop a core base of experienced, knowledgeable CALM teachers who could then serve as facilitators in providing inservice education for other CALM teachers, or they could act as coordinators for the large scale implementation of the curriculum. A CALM teacher commented on this approach:

> In the team approach you can feed off the energy of each other, there is a greater sense of ownership of the course, and the collective intelligence is an advantage in solving problems. The course will be richer from the different teacher perspectives, teaching styles, and areas of expertise.

A CALM coordinator in a large academic high school explained that they had established a team that worked to develop a "comprehensive CALM implementation-resource package so that a new teacher could take it, go through it, and use it verbatim if they needed to, or they could use it as a framework for their own lessons." The purpose of the resource package was to ensure a degree of uniformity in what was being presented in the various CALM classes. It was also designed to assist teachers who had to teach CALM yet had no background experience or expertise in this area. She went on to explain that "by using the resource package teachers could feel confident that what they were presenting to students had been thoroughly tested by experienced teachers, and that it would work with the various teaching styles suggested and the materials included."

### Teacher Selection

School administrators indicated that one of the benefits of becoming involved in the early implementation of CALM was that it provided them with the time and opportunity to become familiar with the philosophy, objectives and intent of the curriculum, and to carefully select the most appropriate teacher to teach the curriculum. The majority of the principals advocated encouraging teachers to volunteer to become involved in teaching CALM. "By adopting a voluntary approach," a principal explained, "administrators are working with teachers who are making a conscious choice to become involved because they see the curriculum as being in tune with their personal needs, values and beliefs, and are therefore willing to become committed to the implementation process." Principals approached the selection of CALM teachers in several ways. Generally, they devoted time during a staff meeting or professional development day to introduce the curriculum, providing an overview of its philosophy, objectives and intent. During this time they also took the opportunity to discuss what the characteristics of a CALM teacher would be, and the kind of commitment and energy that would be involved in teaching the curriculum. Then they would arranged a more in-depth meeting for those teacher who were interested in teaching the curriculum. Through these activities principals delimited the process of teacher selection to those who expressed an interest.

Another approach to teacher selection identified by school administrators was to use a similar introductory procedure to introduce CALM to the general staff, and in some cases identify a group of interested teachers. The next step, however, was to *personally* approach those teachers the administrator deemed most suitable for teaching the curriculum and to ask them to consider teaching CALM. One principal commented that because he felt so strongly about the need for a curriculum like CALM, he selected the best teacher to teach it. He defined 'best' teacher as

> one whom the students respect, who has a strong rapport with the students, empathy and a sense of humour. He or she is enthusiastic and enjoys teaching, and demonstrates maturity in his or her teaching style and relationship with staff and students.

Another principal, supportive of the CALM curriculum, felt that "CALM ought to be viewed as a favorable assignment by teachers, and this perception depends on how administrators select teachers to teach it." He viewed the appointment of teachers to new programs "as a position reserved for the outstanding teacher who is ready for a challenge." Consequently, he personally asked teachers to teach a new curriculum as a form of honour and recognition.

Similarly, another principal explained that when he selected teachers to teach a new curriculum he looked for people who expressed a desire and willingness to become involved. In the case of CALM he looked at their background and qualifications. If they had a strong desire but inappropriate qualifications he considered if it would be worthwhile to provide inservice opportunities for them. Finally, he selected the teacher who would be most suited to teaching the curriculum, and one who he knew would teach the course as intended. In selecting the most appropriate teacher for CALM, a high school principal explained, " I try to select a teacher who most closely approximates W.H. Ogden's description of a good teacher." He quoted, "for a teacher to be of real value to his or her pupils, he or she must be a mature and above all happy person, giving the young the feeling that adult life is infinitely more exciting than their own."

Based on the preceding comments, it is evident that the approach that principals adopted in assigning teachers to the CALM curriculum was a function of their perceived value of the new curriculum, the criteria they had developed in their own minds regarding what constitutes a good CALM teacher, and the significance they attributed to assigning teachers to new programs. For some principals, the assignment of teachers to new programs was a method they employed to reward and recognize teachers for outstanding service and ability. For other principals it was a method of providing a personal challenge for teachers, and still for others, the assignment of teachers to new programs was an administrative task, and the decision was based on the suitability of a teacher to the needs and characteristics of the program. In reality, teacher selection is more likely a combination of some or all of the above factors. What is most clear in this decision-making process is that administrators have a great deal of power to influence the success or impact of a new curriculum through administrative decisions such as teacher selection, program scheduling, and resource allocation, which are ways of communicating the value and priority of the curriculum to their staff.

## Leadership and Management of Change

In the implementation of the provincially mandated CALM curriculum one of the most challenging leadership roles was that of the Project Manager. This person was charged with the responsibility of coordinating and directing the curriculum development and implementation process. In addition, the person was also the critical link between policy makers and policy implementors. To many principals and teachers the CALM Project Manager, Sharon Prather, provided that tangible links among Alberta Education, the government's intent as communicated in the CALM policy initiative, and the actors involved in the various levels of the implementation process. The interviewees viewed Prather as playing a significant role in what they described as the "relatively smooth and well organized development and implementation of CALM." One Program Supervisor commented that teachers and administrators in the school system were pleased to have someone who had led the development of the CALM curriculum also lead its implementation because it gave the whole process continuity. She stated, "we can feel confident when we speak with Sharon Prather that Alberta Education is hearing us, and that our concerns will be considered... Sharon proved to be a straight shooter." Others commented on Prather's strong organizational and human relation skills. A member of the Steering Committee commented,

> Sharon provided a leadership model for the program. She was organized and she could answer any question about the curriculum in terms of a rational statement. She was flexible and adaptable in saying 'Do you agree or disagree?,' and she was willing to make changes based on the outcome to that question. She wasn't coming down with an iron fist saying 'This is the way it will be!'

A field test teacher commented on her interaction with Prather,

> Sharon really wanted to know where we, as teachers, were coming from. She would say 'Here is what they say in the ivory tower, but what is it really like in the trenches?' And she would listen to us and provide us with feedback regarding our recommendations and concerns.

Another Steering Committee member summarized Prather's leadership strengths as residing in her "unlimited energy, commitment and enthusiasm for the curriculum and her belief in the capability of those involved in its development and implementation." She identified Prather's strongest attribute as "her ability to bring people together to work toward a common vision and a common goal."

During an interview conducted by the researcher in June 1988, Sharon Prather was asked to reflect upon her experience in the development and implementation of the CALM curriculum and to identify those characteristics that she deemed necessary to be an effective program manager. Prather identified seven characteristics:

1. *Management Skills* . Prather suggested that to be an effective program manager you must be able to manage budgets, timelines, and information flow. She identified information management as one of the most important skills:

> If you intend to use all of the information that you gather in the field, then you must be able to sit down, translate it and synthesize it. You must be able to do this quickly, effectively, and efficiently because you are working under rigid timelines.

In addition, she added, "a reliable support system and management structure helps to facilitate effective management."

2. *High Energy* . Prather experienced that being a program manger required the ability to be able to " handle all of the conflicting tasks and demands while projecting the impression that you are really keen on the curriculum, and that you are capable of handling its implementation." She concluded that a manager needs the confidence and the energy to prove that this can be done.

3. *Communication Skills* . "A phenomenal part of the work of the program manager involved communicating over the telephone and making presentations," explained Prather. Therefore, she recommended that a manager should have the ability to access information and to communicate it in a clear and precise manner. Being a project manager involves a kind of "mutual learning." "When answering questions or listening to

concerns," explained Prather, "you must remain open to new information (learning), and in doing so you must also be able to put your own ideas and biases on the back burner."

4. *Be Able to Delegate* .. A project manager must know when to delegate, and to whom. However, to delegate effectively, managers must have good support systems and reliable and capable people (Prather).

5. *Writing Skills* . "Being able to get ideas down on paper and across to people are key factors in this position," commented Prather. She went on to explain, 'You have to be able to take information, synthesize it, and communicate it in written form, in a manner that is readable, understandable, unambiguous, and always accurate." Verbal and written communication skills are integral to effective management.

6. *Access to Support Systems* . As project manager, Prather stressed the importance of knowing where your support systems are located within Alberta Education and other government departments related to the curriculum. She stated, "Project mangers need to know who they can go to if they want to work the system effectively." She added, " effective managers must understand the government authorization process, and realize that all decisions take time." Understanding the Department's bureaucracy, how it works, whom to contact, and for what, is beneficial for getting decisions through more quickly. Knowing how other bureaucracies work (i.e., Calgary Board of Education, Edmonton Public School Board) can also be helpful. Prather explained, "In this position it is necessary for me to ask favours, therefore, I must know who is the best person to contact without getting other people upset in terms of jumping the lines of authority and responsibility."

7. *Understanding the Curriculum Development Process* . In the development of new curriculum, Prather advocated that the project manager should be "sensitive to what teachers can teach, the realities of the classroom, and the needs of various kinds of students."

In summary, the perception of the participants was that Sharon Prather played a strong leadership role in the development and implementation of CALM. She seemed to be able to set direction, to engender commitment, to mobilize people to translate decisions into action, and her understanding of and connections with the various levels in the educational bureaucracy. Prather led by example, and relied on the input and expertise of her support team (CALM Project Team, Steering Committee, curriculum writing sub-committees) and feedback from those actors involved in the implementation process in the field. However, Prather's role in the implementation of CALM had its limits. Her role was to develop the curriculum, identify the resources, communicate and clarify the philosophy and intent of the CALM curriculum, and to initiate inservice education for potential CALM teachers. The actual implementation of the CALM curriculum was the responsibility of the local boards, and at this point the leadership of the school principal becomes significant.

## Implementation: The Principal's Perspective

The principals interviewed generally perceived their role in the management of the implementation of the CALM curriculum as that of a facilitator. They perceived their main task as creating the climate for change, and providing the direction, resources and facilities that were necessary to facilitate the implementation of CALM. A high school principal commented on his role in the implementation process:

> As principal it is my responsibility to ensure that CALM is being taught and carried out in the manner and philosophy that was intended. I ask myself the question 'If there is going to be a CALM course what can I do in my school to encourage this course to be successful?' Being held accountable for the implementation of CALM does not necessarily ensure that the course is being taught to its maximum.

How principals went about fulfilling their role in the implementation process ranged from working directly with the designated CALM teacher to plan the logistics of implementing the program, to delegating most of this responsibility to a designated CALM coordinator or department head. The decision made by principals regarding the degree of direct involvement in the implementation process appeared to be a reflection of their philosophy of leadership. Those electing to delegate the majority of responsibilities and decisions related to the implementation of CALM appeared to support the belief that teachers as professionals have the best knowledge of the classroom situation and, therefore can make the most appropriate decisions regarding program implementation. A principal of a rural high school commented,

> As principal I don't have the time to scrutinize every new curriculum. I review them with the expressed purpose of identifying the mandatory requirements and what teacher on my staff I should appoint that would do the curriculum most justice. Aside from budgeting and scheduling the course the details of implementation are left up to the teacher.

In some cases a designated CALM coordinator worked with a team of selected teachers to work out the logistics of implementing the curriculum, with budget allocations determined in consultation with the principal. The primary focus of the principal in these schools appeared to be the smooth maintenance and functioning of the school system.

In contrast, other principals elected to become directly involved in the implementation process, carefully selecting the appropriated teacher, identifying applicable workshops or inservice sessions that teachers might be interested in attending, discussing with teachers their approach to implementing the curriculum. In addition, he provided time before the mandatory implementation date for teachers to experiment with the curriculum, exploring how best to teach it, what resources to use, and testing students' reactions to it.

In either case, whether the principal or a designated department head takes the responsibility for the implementation of CALM, the critical factor seems to be that there is an identifiable person who is responsible for coordinating the implementation process within each school. A CALM Curriculum Supervisor defined this person as the "tangible link between the curriculum document and its translation into practice in the classroom." She went on to explain, "this person ought to be able to provide direction (either directly, or indirectly) , clarification and support during the implementation process" for the CALM teacher. A Curriculum Consultant commented, "Teachers need to have a clear understanding of their role expectations and the parameters within which they are expected to function. They must also have direction regarding where to go for assistance, support or clarification."

## Communication

Those principals who elected to become involved in the early implementation of the CALM curriculum felt responsible for keeping informed about and abreast of change and, in turn, for communicating these changes to the staff. "In this manner," a principal explained, "change becomes a part of organizational life, something that the staff expects and can prepare for." Another principal highlighted the importance of information management:

> Anxiety and resistance to a change are often due to a lack of knowledge or understanding regarding the meaning of the change. Teachers need accurate up to date information so that they can better formulate their opinions and positions regarding the change. Helping teachers to cope with a mandated change involves disseminating accurate information, and then listening to their fears, concerns and problems. By keeping staff informed there are no surprises because everyone knows what is coming. In this manner staff can prepare for the future, regardless of whether or not they want to become involved in the early implementation of a change.

Another principal emphasized the importance of an information linkage between the Department of Education and schools:

> Accurate and up to date information is important because it reduces unnecessary anxiety and dispells rumours and misinformation. If people know what is happening and the position of Alberta Education, their school board, and that of any other significant group, they can have a better understanding regarding how the change is going to affect them.

In helping teachers to implement a change one principal explained that teachers need information that helps them to understand why change is necessary and how the change will affect them directly. Additionally, they need ample time and opportunity to prepare to implement it effectively.

## Vision

Principals, in communicating information to staff regarding impending changes, have the responsibility to first ensure that the information is accurate, and second, that they themselves have taken the time to consider the meaning and implications of these changes (or information) for the staff and for the future of the organizational life of the school. The goal is for the staff to feel confident that the impending change can be adapted to the philosophy of the school and incorporated into long, or short range plans. A principal commented:

> When dealing with a number of changes that will be occurring over a relatively short period of time principals needs to develop a long range plan of approximately five years. They need to develop and communicate a vision of how the changes will be implemented in a systematic manner. Such a plan gives the staff and administration a sense of direction and control.

In sum, for staff to cope with change relevant information ought to be presented within a context or framework which provides direction for the implementation of that change (i.e., timeline, role expectations, and implications for programs, teachers and students). A principal shared his philosophy of planning for change:

> One of my immediate concerns in implementing a new course is human resources. Right from the outset I try to get teachers involved and excited about the new course so that they will view it positively. Getting them involved as early as possible allows them to develop and grow with the curriculum philosophy. Early involvement requires foresight and planning on my behalf. I have to keep abreast of changes, and cognizant of windows of opportunity for my staff to become involved.

Another principal observed:

> The smart administrator is aware of the potential impact of the Secondary Education policy and will begin to prepare for its implementation as early as possible. He must project the attitude that change is good, and attempt to provide the opportunity for change to occur gradually. This is accomplished by early involvement in the implementation of policy initiatives.

### Support

In conversation with teachers and administrators regarding how to assist teachers to cope effectively with the implementation of change, two levels of support were mentioned: psychological support and support through the provisions of resources and facilities. Psychological support involved providing teachers with the reassurance that they have the capability to teach the curriculum, and that there will be workshops or inservice sessions which they can attend to attain additional skills and knowledge related to teaching the curriculum. A Curriculum Supervisor explained:

> Teachers need the reassurance that there are other teachers experiencing similar problems or concerns regarding the implementation of the new curriculum, and that there are also people who can provide guidance and assistance.

The second level of support dealt with the provision of the necessary resources to facilitate implementation. These resources included a budget, supplies (textbooks, films, and brochures), facilities (appropriate classroom space and seating arrangement), and time (timetabling, teacher preparation, program experimentation). In conclusion, principals appeared to play the role of a facilitator in providing psychological reassurance, in directing teachers to support people in the school system or community, and in providing the resources that will make implementation possible.

## Conclusion

The study revealed a number of factors which significantly influenced principals' decision to voluntarily become involved in the implementation of CALM before the mandatory date. These factors included a philosophical position which viewed change as an opportunity and a challenge for administrators, teachers and students. The management of change was viewed as a skill to be mastered. Consequently, their major strategy for managing change was to plan for orderly implementation by becoming involved in the process as early as possible, giving the staff and themselves the opportunity to experiment with how best to implement the curriculum before the mandatory date. The other significant factors that influenced their decision were that the curriculum was perceived to be academically challenging, met the current and future needs of students, and was technically, politically and economically feasible to implement before the mandatory date.

# Chapter 7

# DISCUSSION AND REFLECTION

The purpose of this chapter is to discuss and reflect upon the procedures and findings of the study from the researcher's perspective. In the previous chapters the researcher attempted to describe the implementation of CALM in a manner which represented the voice and perspectives of the participants in the study. In this chapter the researcher attempts step back from the description and to reflect upon the implementation process from a more critical perspective. The discussion of the process is presented in relation to three phases -- the genesis, adoption, and voluntary implementation of CALM.

## GENESIS

Perhaps one of the most important lessons learned in designing and executing this study was the need to approach the analysis of policy implementation from a holistic perspective. Describing and analyzing the processes involved in the implementation of CALM and understanding how the participants responded to the policy initiative required an examination of the process both from a macro (structural) and micro (interpretive) perspective, as well as an examination of the context in which the policy initiative was developed and implemented. William Dunn (1981) made the statement "In reality policy problems are not independent entities; they are parts of whole systems of problems best described as messes..." (p.99). The implementation of policy in educational organizations is an example of a problematic web. Even though the provincial educational system is a structured bureaucracy (Alberta Education, School Boards, Schools etc), the practitioners are subject to weak hierarchical control in their work making it difficult to control the implementation process. As well, the governance and management of education at all levels (provincial, district, local) is influenced by input from politicians, civil servants and professional educators who are subject to, and constrained by, external influences related to the social, political and economic environment. Finally, implementation is affected by how the particular policy initiative is interconnected with other provincial policy goals, and the extent to which the policy makers make this interconnnection explicit to implementors.

Early in the data collection process the researcher became aware that certain participants in the study projected an attitude characterized by skepticism with regard to the origin and need for the CALM curriculum. Upon further investigation it became apparent that this skepticism was rooted in their reaction to the Secondary Education policy in general, and to the mandatory nature of CALM in particular. For these participants the critical question underlying the initiative to implement CALM related to whether CALM was developed in response to predominantly political pressure or to the educational needs of students. An examination of the health promotion movement in Canada gave credence to this skepticism regarding the origin of CALM.

In Chapter 4 the researcher attempted to demonstrate that the impetus for CALM could be traced to a 1974 report from the Minister of the Department of National Health and Welfare. The report, entitled *A New Perspective on Health of Canadians* , emphasized the importance of the concept of a health partnership between the government and individual citizens in the "management" of the status of health of Canadians. The problem of getting people to take responsibility for their health and to make wise lifestyle choices required education and widespread awareness of the need to take personal action. The impact of this report was felt in Alberta at both the provincial and local levels when the Provincial Government set up a task force which comprised representatives from various government departments to make recommendations regarding health education in schools. The key recommendation was that Alberta Education was the best vehicle to effectively deal with the problems and inadequacies in health education because the department had the mandate to develop and implement curriculum. Thus, they recommended the development of a k-12 mandatory health curriculum.

By 1985 the final stages of this recommendation were about to come to fruition, in that a proposed senior high health curriculum was ready for approval; however, when the *Secondary Education in Alberta* policy was released all secondary programs in developmental stages were put on hold, and the curriculum project teams were disbanded. Consequently, those involved in, or familiar with, the development of this proposed senior high health curriculum had difficulty believing that the impetus for CALM came out of the Secondary Education Review. They felt that in 1980 the Government already knew that there was a need to develop a senior high health curriculum. While the Secondary Education Review conducted four years later might have reconfirmed this need, the question still remained, "Why go through the whole curriculum development process again when Alberta Education could have revised the proposed senior high health curriculum in light of the directives articulated in the Secondary Education policy statement?" and "Why promote CALM as a 'new' curriculum" when for some participants it represented the "proposed" senior high health curriculum in a new package. By examining the impetus for and development of CALM from an historical perspective brought into question the political agenda implicit in the Secondary Education policy statement which set the direction for educational reform in Alberta.

Second, the view that CALM was developed in response to predominantly political pressure rather than educational needs was supported by intergovernmental representation on the CALM Steering Committee. Half of the members were representative of government departments such as Community Health, Consumer and Corporate Affairs, Career Development and Employment and Alberta Education, while the other half were representatives of teachers and principals. Therefore it was of no surprise that the five core themes in the CALM curriculum in some way reflected the philosophy and mandates of these government departments. CALM appeared to be a curriculum that helped a number of government departments to serve their interests.

A comparison of social and economic goals of the Provincial Government with those articulated in the Secondary Education policy and the CALM curriculum guide reveals an apparent congruence among goals. The social and economic goals of the Provincial Government suggested that in exchange for the right to have the opportunity to achieve high social and economic standards the individual ought to contribute to the economic and social well being of society (Economic and Social Progress Goals, Progress Report V, 1977, p.2). In the Secondary Education policy statement (1986,p.7) the aim of education was identified as equipping individuals with the appropriate knowledge and attitudes to improve their personal lives and the life of the community. The CALM curriculum guide defined the appropriate skills, knowledge and attitudes that would help individuals to take control of their lives, get along with others, and contribute more positively to society (Goals of CALM, Interim Curriculum Guide, 1987, p.3). Central to all three statements was the concept of self reliance and increased independence from the Government for the fulfillment of individual, social or economic needs. In terms of education, there was little discourse regarding the government's responsibility for individual learners. The assumption appeared to be that individuals seek to be contributing members of society, and that it is the responsibility of individuals' to make use of the knowledge, skills and attitudes that they have had the opportunity to acquire. Finally, it assumes that it is possible to identify those generic skills, knowledge and attitudes that will be transferrable to, and instrumental in, shaping our changing world.

The congruence among the social and economic goals of the Government, the goals of secondary education, and the goals of the CALM curriculum reflect an instrumental view of schooling. The school is viewed as an instructional site for delivering the appropriate skills, attitudes and knowledge to children so that they can grow up as self-reliant contributing (productivity) members of society (labour force). However, these appropriate skills, attitudes and knowledge appear to be defined first in economic terms, and second, in social terms. The needs of society seem to take precedence over the needs of the individual to the point where society is reified as if it exists independent of the citizens from which it is comprised. In his discussion of changes in curriculum policy, Education Minister Jim Dinning (1990) made the statement, "The job of educating our children must not turn into a struggle for power. We cannot have winners and losers. The task is too important. We all win if our children grow up to be productive, caring, contributing members of their community and their world. We all win by giving them tools to meet the challenges of the future" (p.7). Once again, this instrumental view of education is reinforced by defining "winning" in terms of student productivity and contribution to society. The assumption is that there is general agreement among parents, government and other stakeholder groups regarding what constitutes winning and losing, productivity and caring, and the future. Additionally, it is assumed that students can be "equipped" with "tools" to shape, or at a minimum, to cope with that projected future.

Finally, the choice of the title "Career and Life Management" suggests a secular humanistic orientation to life. It makes the assumption that life can be controlled, planned and directed by applying the principles of business management. This perspective does not acknowledge a place for the spiritual or intuitive dimension of people in preparing them to be productive and contributing members of society.

In coming to a more comprehensive understanding of the development and implementation of CALM, it was necessary to examine significant historical events which preceded and probably influenced, the genesis of CALM. Two significant factors or events influenced the attitude of some of the participants in the study and affected their level of support for the implementation of CALM. The first factor was the Canadian Health promotion movement, and second, was the existence of a proposed senior high health curriculum that never came to fruition. These factors, as well as the political representation on the CALM Steering Committee, created an atmosphere of distrust among educators regarding the educational need for a CALM curriculum. They believed that CALM was developed in response to political pressure and as a means to fulfilling the social and economic objectives of the government. Perhaps the real root of the skepticism and distrust was that neither Alberta Education nor the government explicated what the role of schooling in general, and CALM in particular, should play in fulfilling provincial social and economic goals. It may well be that society shares an instrumental view of education and supports the role of schooling in fulfilling the social and economic goals of the Province.

A consideration of the genesis of CALM brings into question the role of government in the formulation of educational policy and the role of publically funded education. Should education reflect and perpetuate a society that values competitive, individualistic, consumer oriented society in which corporate values are held in high esteem? Or should education question and seek to change the future direction of society? If education is to be a vehicle through which the individual can transcend social and economic barriers, then should transcendence be measured in terms of capital accumulation (purchasing power), and gained through competition and acquiescence to the predominant norms of society?

### Adoption

Fullan (1982) argued that the success or effectiveness of the implementation of a policy initiative is to a large degree contingent upon how well the program is initiated and followed through (p.227). The literature on policy implementation suggests that for an initiative to be accepted a number of preconditions have to be met (Berman & McLaughlin, 1976, Fullan, 1982, and O'Toole, 1986). First, the curriculum has to be perceived as being of high quality, and one that meets a perceived need for the students. Second, the implementors must feel that they have the knowledge, skill and general capacity to facilitate the successful implementation of the proposed curriculum. Third, teachers and administrators have to be willing, or in some way motivated, to want to implement the curriculum. The implementation of a mandated curriculum makes the process more problematic. In the case of CALM, the participants in the study felt that they were not consulted regarding whether or not they perceived there to be a need for a CALM curriculum, let alone whether or not they felt it should be mandatory. When they attended CALM information sessions they expected to have the opportunity to discuss issues and concerns about implementation and the mandatory nature of the curriculum. Instead they found that the expressed purpose of these sessions was to tell them about the rationale behind the curriculum and the role they ought to fulfill in the implementation process. The only decision left up to administrators was whether or not they wanted to implement CALM before the mandatory date. Thus, questions regarding motivation, perceived need, and capacity were ultimately not factors over which the Project Team had much control but certainly were factors with which administrators had to contend. The problem for the Project Team became, "How to make people want to implement something that they had to implement?" The problem for administrators became how to ensure that the staff would have the capacity and motivation to implement CALM.

The CALM Project Team adopted a "marketing" approach to the implementation of CALM with their goal being to achieve a common understanding of the philosophy, rationale and objectives of the curriculum among administrators, teachers and concerned community groups in order to ensure an acceptable, high degree of fidelity in implementation at the local level. The key marketing strategy focused on information, education and clarification of the goals and intent of the curriculum. An underlying assumption was that once teachers and administrators understood the philosophy and rationale of the curriculum they would be more apt to support rather than to oppose it. Information and understanding were equated with acceptance and commitment to implementation; however, this equation did not take into consideration the realities of administrative life, nor the life of the classroom teacher. While teachers and administrators may have understood and even supported the implementation of CALM, the constraints of particular environment may not have made implementation feasible at that point in time.

Alberta Education appeared to take a linear view of policy formulation and implementation. The apparent assumption was that once policy was formulated it would then be adopted and implemented. Policy makers focused on initiating the implementation process (e.g., curriculum content and approved resources) and monitoring outcomes (student achievement). They maintained that the education of children was a shared responsibility among parents, educators and society. In designing the implementation strategy for CALM the Project Team adopted a cascade model in which they initiated the implementation of CALM by providing the curriculum guide, identifying and approving resources, and training system coordinators to facilitate implementation at the school district level. In other words, Alberta Education provided the resources and initiated the formulation of the infrastructure for the continuation of the curriculum in the schools. School districts and cooperating government agencies (i.e., Alberta Drug and Alcohol Abuse Centers, Community Health Units) were expected to become partners in the implementation process by providing support, guidance, and assistance for teachers in the delivery of the subject matter in the classroom. The central aim of the cascade model was to create a team approach to the implementation of CALM and to encourage a sense of broad ownership in the curriculum, decentralizing the responsibility for implementation. The end result was to be a decreased dependency on Alberta Education for curriculum implementation.

There are a number of problems inherent in the cascade model. First, there must be real opportunity for people to develop a sense of ownership in the implementation of the curriculum. In the case of CALM there was little consultation with practioners at the developmental stages. Second, there was little discretion or choice left up to the practitioner regarding when or how to implement CALM. The curriculum and the delivery process were all part of the provincial mandate. Third, the model is based on the assumption that actors at the successive levels of implementation understand and support the curriculum and will comply with expected or prescribed roles in the implementation process. Finally, the model assumes that school districts will have the capacity and resources to fulfill their roles. The concept of a partnership in the implementation process may be viewed as another way of describing the prescriptive roles that practioners are expected to play in the implementation of CALM.

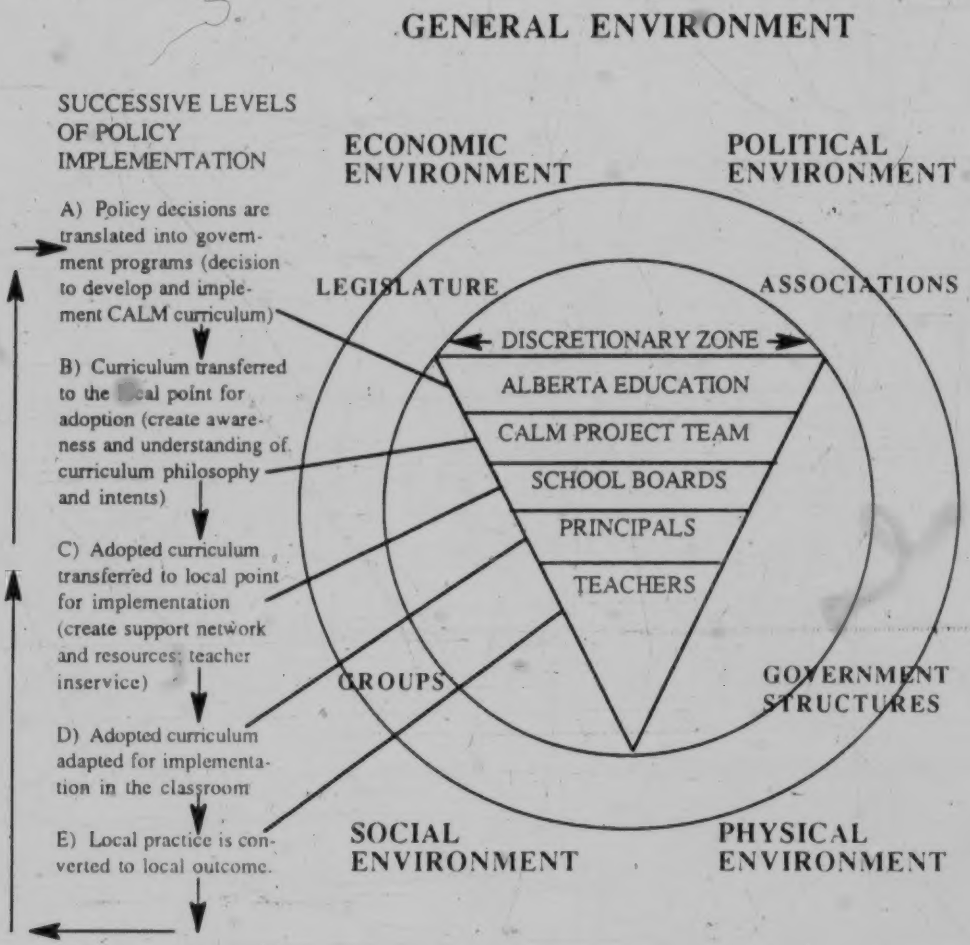
The question emerges, "What would be the fate of CALM if certain actors did not comply with the expectations for their role in supporting the implementation process?" Second, "What will be the fate of CALM in those schools and school districts where the administration does not perceive its implementation to be of value or high priority?" Finally, "How is Alberta Education going to monitor and evaluate the effectiveness of this model of implementation?" It would seem that during the voluntary stage of implementation the success of the cascade model is dependent upon the extent to which the actors understand, and have the capacity to fulfill, their role as well as the extent to which they are willing to accept the model and their subsequent role in the implementation process.

In Alberta Education's attempt to decentralize responsibility for the implementation of CALM, while at the same time ensuring a certain degree of fidelity with the goal and objectives of the curriculum, they developed explicit resources. The implementation manual gave administrators suggestions as to how they could facilitate implementation through teacher selection, program scheduling and teacher support. For teachers they provided a custom published textbook, a resource manual and a curriculum guide complete with examples and suggestions regarding how to implement CALM in the classroom. The result of such efforts is best described in the words of Education Minister Jim Dinning (1990):

> As a rule, the provincial government's role is to identify the course content. Teachers have professional training and are usually well qualified to select instructional approaches. However, CALM 20 was a different sort of course and a new departure for the senior high program. Therefore, the committees and project team worked not only on what should be taught, but also on how the program could be offered in schools. (p.9)

Thus, the original pyramid model of policy implementation was inverted (Figure 2 *Implementation of educational policy: A micro perspective* ) with the discretionary zone

## IMPLEMENTATION OF EDUCATIONAL POLICY: A MICRO PERSPECTIVE


GENERAL ENVIRONMENT
ECONOMIC ENVIRONMENT
POLITICAL ENVIRONMENT
LEGISLATURE
ASSOCIATIONS
DISCRETIONARY ZONE
ALBERTA EDUCATION
CALM PROJECT TEAM
SCHOOL BOARDS
PRINCIPALS
TEACHERS
GROUPS
GOVERNMENT STRUCTURES
SOCIAL ENVIRONMENT
PHYSICAL ENVIRONMENT

SUCCESSIVE LEVELS OF POLICY IMPLEMENTATION

A) Policy decisions are translated into government programs (decision to develop and implement CALM curriculum)

B) Curriculum transferred to the local point for adoption (create awareness and understanding of curriculum philosophy and intents)

C) Adopted curriculum transferred to local point for implementation (create support network and resources; teacher inservice)

D) Adopted curriculum adapted for implementation in the classroom

E) Local practice is converted to local outcome.

FIGURE 2

remaining with the policy makers and curriculum developers. Those near the bottom are viewed as having the capability and technology to select instructional approaches for curriculum which already existed. However, their pedagogical expertise was viewed as insufficient or not transferrable to dealing with the implementation of new curriculum. The voice of the classroom teacher in the implementation endeavor was lost amidst the textbooks, resources and manuals. The image of teachers that emerged was that of a reproductive means technicians. Their role was limited to receiving directives from those more knowledgeable and higher up in the educational bureaucracy, and producing the desired results in the classroom.

## Implementation

The term implementation has been used to describe the processes involved in putting into practice a change, policy or innovation. This process involves an exchange; something must be given up or eliminated to make room for the change or innovation. Consequently, for some people change involves loss. This concept is significant in understanding how people come to terms with the implementation of a mandated curriculum.

In designing an implementation plan or strategy, implementors (i.e., Alberta Education) at upper levels in the structure appear to adopt a linear or mechanistic view of the implementation process. The assumption is that actors positioned at the successive levels of implementation will accept, understand, and comply with the overall implementation plan. However, the implementation of a policy initiative is a human process subject to the idiosyncrasies of the people involved in the successive levels of the process. Consequently, there are often obstacles or events that impede the implementation process from proceeding according to plan, and in some cases preventing the goals and objectives of the policy from being fully realized. In the case of the implementation of CALM, some of these obstacles were identified by the participants as the territorial nature of senior high teachers, fear of change, misinformation or a lack of information, and past experience with curricular change. While upper level implementors perceived these factors as impediments in the process, teachers and administrators perceived them as reflections of the realities of practice and the meaning of change for the practitioner.

From the perspective of the practitioner, the integration of the CALM curriculum into the core requirements for a high school diploma explicitly meant a reduction in program choice for students and a consequent reduction in optional course offerings in the high school. Principals were faced with the tasks of eliminating or reducing scheduled course offerings to make room for the CALM curriculum and of reallocating teaching assignments in order to offer enough sections of the curriculum to accommodate diploma requirements for all students. These changes had significant implications for teachers of optional courses, particularly in the areas of Home Economics, Industrial Arts, Business Education, and Personal Living Skills. Teachers in these subject areas had a vested interest in protecting their areas of specialization. The implementation of CALM not only threatened the viability of their programs, but for some teachers it signalled the need for them to begin to develop a new area of specialization in order to secure their position in a high school. Implementing a new curriculum and moving into a new area of specialization involved taking the risk of upsetting the teacher's sense of a well organized and established level of accomplishment and professional identity. It also brought into question their professional capacity in terms of possessing or having to acquire the necessary skills and knowledge to implement the curriculum effectively. For most teachers in the study, the decision to implement CALM involved an evaluation of the following factors: the value of the curriculum in terms of meeting the needs of local students, the degree of confidence in their own capability to teach the curriculum, the adequacy of support and resources to assist them to get through the curriculum, and finally, the reasonability of the costs (social, economic and emotional) of implementation.

In the study there were essentially two categories of teacher responses to the question regarding why they made the decision to become involved in the early implementation of the CALM curriculum. One category was the response of those teachers for whom teaching was a second career choice, their first career being in the areas of nursing, church ministry, and guidance counselling. Based on their work experience, their role as a parent and as a teacher, and their relationship with teenagers, they perceived that there was a real need for senior high students to have the opportunity to learn about and to acquire skills for independent living. They viewed CALM as being congruent with their philosophy of education, and as providing the bridge between what is and what ought to be in terms of course offerings for senior high students. In describing their enthusiasm and support for CALM, they used such language as their "crusade for CALM" and their "testimonial" for CALM. This language suggested an altruistic or inner motivation to teach CALM in hopes of helping and having a positive impact on the lives of teenagers.

The other category of responses from teachers who elected to become involved in the voluntary implementation of CALM was based on the perspective that the implementation of a new curriculum was both a challenge and an opportunity for career advancement or job security. For these teachers the opportunity to teach CALM meant being a pioneer in a new area of specialization which also brought the security of teaching a high school core subject. They tended to use the language of commerce to describe their support for CALM. For example, they described their involvement as "buying into it," or that they were "sold on CALM." This kind of language gave the impression that their decision to teach CALM was viewed as an investment of their time and energy in hopes of future returns such as job security or career advancement. Their decision focused more clearly on a personal evaluation of the costs and benefits of teaching CALM, whereas the previous group focused their decision on fulfilling the needs of students first, and finding satisfaction in doing so.

There was one group of CALM teachers whose voice was not directly represented in the findings of the study. This included the teacher who did not make the personal choice to teach CALM but was given the assignment due to such factors as openings in the timetable, low student enrollment in a subject area specialization, or as a means of maintaining a position at the high school level. For these teachers there was likely little motivation, other than professional obligation and pride, to become prepared to teach CALM. In these kinds of situations the question of fidelity in implementation becomes one of concern, and the possibilities for cooptation or non-implementation increases. These teachers have the option of following the curriculum guide as planned with their main goal being simply to get through the material or to continue to teach that with which they are familiar (i.e, Personal Living Skills) under the aegis of CALM. These are real problems when dealing with a mandated curriculum that has been designed to meet the needs and interests of students,but which few want to teach or feels competent enough to teach. Consequently, the potential for the curriculum is never realized, and the students are simply the recipients of information for which and the teacher the conduit.

Finally, in reviewing the decisions of teachers to become involved in the implementation of CALM it became apparent that there was little discussion regarding the substantive content of the curriculum. Their involvement decisions were based essentially on an evaluation of the personal cost and benefits of teaching CALM, or on administrative and technical concerns. What was missing was a real interest in the needs of students and in how CALM fulfilled that need. Some administrators resisted the implementation of CALM on the grounds that it was mandatory and because they were not consulted in determining if there was a need for such a curriculum. At the same time that they were resisting implementation, teachers in some of the school systems which they represented were grouping together to prepare for the implementation of CALM. In some cases they approached their principals to request permission to become involved in the voluntary implementation. The teachers held the view that since the implementation of CALM was a given (mandatory), and since they were ultimately the ones who had to implement the curriculum in the classroom, they wanted the opportunity to begin preparing as soon as possible. The question becomes, "What role do teachers and administrators perceive they play in the implementation of curricular change, and what role would they like to play?"

There seems to be a sense of resignation or acquiescence to the changes in secondary education programs as a result of the Secondary Education policy, with protest or the voicing of opinion on behalf of teachers left up to organized associations and interests groups. Teachers appear powerless to affect curriculum decisions. They appear to view themselves as classroom based specialists thereby perpetuating an image of a "means technician." This perspective is reinforced in their requests for a "cookbook" implementation manual and resources, conveying the image of teacher involvement in curriculum implementation as a reproductive task. Perhaps this response is the result of rapid curricular change without sufficient time for teachers to prepare and inadequate inservice activities to help them come to an understanding of the changes. Or perhaps the problem lies with the curriculum implementation model adopted by Alberta Education with its emphasis on inputs and outputs and limited attention to what goes on in between, a part which is left to the discretion of the practitioner. There appears to be a need to re-examine critically who teachers are, what teaching has become, and the place of the student in the schooling process.

## Summary

This chapter has attempted to represent the voice of the researcher in reflecting upon and questioning the processes and strategies involved in the implementation of the CALM curriculum. The researcher makes the point that to understand the complex process of implementing curricular change it is necessary to examine the history behind the impetus to develop the curriculum, the context in which it was developed, the strategies used to implement it, and finally, how the practitioner interpreted the process. The researcher concludes by raising questions regarding the role of the teacher and the student in the implementation of curricular change.

## Chapter 8

# SUMMARY, CONCLUSIONS AND IMPLICATIONS

The purpose of this chapter is to provide a summary of the methodology, the findings and conclusions of the study. The chapter ends with a discussion of implications for theory, research and practice.

### Nature of the Study

The central purpose of the study was to undertake an investigation into how a particular policy initiative was transformed into action. It included an analysis of how the interplay of political, technical, bureaucratic, and socio-economic factors, as well as the perceptions and dispositions of the actors at the successive levels in the implementation process, influenced the process of making operational a curriculum policy initiative. To facilitate this investigation the study was designed as a two level study. A macro-level perspective was taken of what Alberta Education did to introduce and facilitate the implementation of a policy initiative in combination with a micro-level perspective of the factors which influenced the decision of actors at the local level to become involved in the early implementation of the policy. The following questions were used to guide the investigation.

A. The Genesis of CALM

1. What factors and/or events influenced Alberta Education's decision to develop a CALM curriculum as a mandatory core requirement for a high school diploma?

B. The Implementation of CALM

2. What strategies and techniques were used by Alberta Education to introduce and implement CALM at the school district level?

2.1 What factors influenced local level decisions to become involved in the implementation process?

C. Environmental Factors

3. What environmental factors influenced the implementation of the CALM curriculum?

The analysis of the study was divided into three stages in the implementation of the Career and Life Management curriculum. The first stage dealt with the genesis of the curriculum. It attempted to answer the question "What factors influenced the development of the CALM curriculum?" The second stage dealt with the administrative processes involved in the development of the curriculum, and included an examination of the strategies and techniques adopted by the CALM Project Team to create an awareness and understanding of the objectives of the new curriculum. The underlying purpose of this stage was to develop, through information dissemination, support for and commitment to the implementation of the curriculum. This stage might be referred to as "curriculum image development," or "curriculum marketing." Finally, the third stage dealt with the processes involved in the actual implementation of the curriculum. Specific factors which influenced principals' decisions regarding whether or not to support the voluntary implementation of CALM were examined. A critical reflection of the processes and findings of the study from the perspective of the researcher constitutes a concluding stage of the research.

## Research Methodology

The study was conducted from an interpretive perspective using case study methodology. The primary data collection techniques included 38 in-depth interviews, numerous informal interviews, participant observation at meetings, conferences, workshops, and seminars, and the analysis of primary and secondary source documents. The study was delimited to the time period of June, 1985 when the *Secondary Education in Alberta* policy was released, to June, 1988 which marked the end of the first year of voluntary implementation of the CALM curriculum.

The implementation of CALM was investigated as it was occurring. The research was based on two central assumptions and a number of general open-ended questions (see Appendix G, *Interview Questions* ). These assumptions included the concept that policy has no existence apart from the individuals who define it. Second, the policy implementation process is shaped and constructed through the network of meaning created by the people involved in the successive levels in the implementation process. As data were collected they were analyzed and categorized with the intent of identifying emergent themes that merited further investigation and of sharpening the focus of the research questions. These questions will be used to discuss the findings and conclusions of the study.

## Findings

The findings are summarized in relation to each of the research questions which guided the investigation.

1. What factors and/or events influenced Alberta Education's decision to develop a CALM curriculum as a mandatory core requirement for a high school diploma?

From the perspective of Alberta Education and those involved in the development of the CALM curriculum the impetus for CALM was the direct result of the findings of the 1984 Secondary Education Review. The results of the Review indicated that the citizens of Alberta identified the need for students to acquire practical life-skills in the areas of careers, finance, interpersonal relationships, and health and lifestyle. Alberta Education recognized that some of these life skills were already being taught as discrete topics in various courses. Therefore, they made the decision to bring all of these themes (topics) together under one new course and to make it mandatory so that every high school student would have the opportunity to acquire knowledge and skills in these areas.

Some of the participants in the study were of the view that CALM was developed as a vehicle through which a number of government departments could fulfill their mandates. More explicitly, in 1980 an Interprovincial Task Force was established to identify critical health needs of school age children and to make recommendations regarding how to fulfill or cope with these needs. The task force recommended that Alberta Education, with its mandate to develop and implement curriculum, should be the vehicle through which the government dealt with the inadequacies and problems in the present situation. Further, they specifically recommended the development of a core k-12 health curriculum. The task force identified relevant government and community resources in the curriculum guide. and they also identified nine themes that could be used for the framework of the curriculum. The result was the development and implementation of an elementary and junior high Health curriculum, and a draft of a senior high Health curriculum. The senior high Health curriculum was never implemented because when the *Secondary Education in Alberta* policy was released work on all secondary education programs in their developmental stages was suspended. Finally, the five themes (self management, well-being, relationships, careers and the world of work, independent living) which provided the framework for the CALM curriculum were very similar to the nine themes in the "proposed" health curriculum (body knowledge, care and maintenance; self-awareness and acceptance; the family; relating to others; preparation for marriage; responsible parenthood; life styles; and careers).

Based on the realization that the government had the knowledge of the need for a curriculum related to skills for independent living four years before the Secondary Education Review was conducted, and based on the reality that an appropriate senior high curriculum was already near completion, some participants felt that the initiative to develop and implement CALM was a very visible and safe means by which the government could say to citizens that they were listening and responding to their needs and interests. Finally, the possibility that CALM was developed to fulfill the mandate of other government departments was further reinforced by the interdepartmental representation on the CALM Steering Committee, and the curriculum emphasis on self-reliance and preparation for the world of work.

2. What strategies and techniques were used by Alberta to introduce and implement CALM at the school district level?

From the perspective of Alberta Education the introduction, adoption and implementation of CALM were treated as parts of a single process. A cascade model for the implementation of CALM was based on the assumption that implementation was a process shared by Alberta Education, school and school system administrators, teachers, and cooperating government and community agencies (regional offices, career centres, health units, colleges and Universities). Inherent in this model was the concept of a team approach to implementation in which at least theoretically, there would be no single leader. The model reduced direct dependency of school jurisdictions (i.e., teachers) on Alberta Education for inservice and support. Thus, the role of Alberta Education was to initiate the process by designing the curriculum and providing resources -- such as an implementation manual and a teacher resource manual -- to support implementation. The initiation-implementation strategy was divided into two stages. The first stage was to build among administrators, teachers, relevant government agencies and concerned community groups, awareness and a common understanding of the philosophy, goals and expectations inherent in the curriculum. This was accomplished through information sessions, a symposium, and print materials (i.e., Implementation Manual, Teacher Resource Manual).

The second stage was to expand the skills and knowledge of administrators and teachers to enable implementation. It was at this stage that Alberta Education attempted to create the infrastructure for the implementation of CALM. Superintendents were encouraged to appoint CALM coordinators who would be trained by Alberta Education as leaders. These leaders would be responsible for facilitating the implementation of CALM at the local level through inservice activities, by identifying potential participants in a local support network, and by providing information, guidance and clarification for teachers and administrators.

Alberta Education, in cooperation with the ACCESS Television Network, provided a generic inservice package for teachers, administrators, and interested parents and community groups. It consisted of a series of video tapes that were initially broadcast on the ACCESS Television Network as a means to introduce educators and citizens to CALM. In the broadcast there was an interactive component in which anyone could phone in and ask questions or seek clarification regarding the content or implementation of CALM. These video tapes along with an inservice manual were also available to schools and school districts for use at on-site inservice sessions. The intent of Alberta Education that on-going support for CALM would be provided by the CALM system coordinators, and Alberta Education Regional Staff; however, at the time of the study this stage was yet to be implemented.

Because the study examined only the voluntary stages of the implementation of CALM it was not possible to assess or evaluate the degree to which all of the stages in the cascade model came to fruition. However, there was evidence of one school district creating an in-house steering committee to develop a strategy for implementing CALM. A district level implementation team was formed to conduct comprehensive inservice sessions for teachers and to provide them with opportunities to develop an informal support network. This team approach was then used to implement CALM in a number of high schools in that district. In one urban center the public high school principal and CALM teacher, along with assistance of Alberta Education, hosted a two day workshop for over fifty interested teachers. The workshop focused on dissemination of information, on establishing local support networks and on identifying resources. It was the intent of

Alberta Education that this local level response to providing teacher inservice would serve as a model for other districts.

2.1 What factors influenced decisions of the local level decisions regarding involvement in the implementation process?

For school administrators the decision regarding whether or not to become involved in the implementation of CALM before the mandatory date was negotiated to fit the multiple demands, priorities, and values operating in particular environments. In addition, their decision was also a reflection of how they perceived change in general and CALM in particular. Some of the contextual factors that constrained administrators' implementation decision included the perceived need for CALM in a particular school or school district, and the capacity of the teachers to implement the curriculum. In one rural school CALM was implemented in response to problems with self-esteem, lack of career direction and high incidents of suicide among the native student population. Another rural school implemented CALM as a means of addressing the student need for skills for independent living. In that community students were faced with the reality of having to seek employment or further education away from home. In yet another rural school the implementation of CALM was delayed until the mandatory date because teachers, with assistance of members of the community, were already addressing student lifeskill needs through locally developed programs in the community school.

Another source of constraints which influenced principals' implementation decisions were the competing demands on the school budget and on teachers' time. In some rural schools teachers were required to teach in as many as three different subject areas. As a result of low student enrollment the school was barely able to offer the core requirements for a high school diploma. Implementing CALM was viewed as an administrative "nightmare." In addition to heavy teaching assignments, teachers in some schools were expected to participate in extra-curricular activities. Consequently, they had little spare time to travel to urban centers to attend teacher inservice activities. The schools did not have the capacity nor the funds to provide adequate release time for teachers to attend these activities.

How principals viewed their leadership role in the school also influenced their decision regarding when to implement CALM. The goal of many administrators was the maintenance of an orderly and stable environment in the school. For some, this sense of order was achieved through long term planning. Early involvement in the implementation of CALM provided the administrator and staff with the time to experiment with how best to adapt the curriculum to the needs of the students in that particular school. Other administrators worked on one year plans and delegated implementation decisions to assigned department heads. Their role in the process was to allocate funds, to assign the curriculum to a particular department, and in some cases to schedule the course into the timetable. It was at the discretion of the department head or individual teachers to make the decision to become involved in CALM before the mandatory date.

Given the contextual constraints of the local school site, another key factor which influenced administrators' implementation decisions was their attitude toward implementation of curricular change. Those administrators who elected to implement CALM before the mandatory date shared a number of common characteristics. These administrators had formulated a working philosophy of their role in the management of change; they also had a vision and plan for the school. In this plan was the idea that change could be viewed as a challenge and an opportunity and that the management of change was a skill to be mastered. Consequently, these principals planned for the orderly implementation of CALM by having teachers become involved in CALM as early as possible. Second, they gave support to teachers by planning with them. Because these principals were cognizant of teacher needs and concerns they provided the time and opportunity for teachers to experiment with the implementation of CALM, to capitalize on their pedagogical strengths, and to adapt the curriculum to the needs of the students. Early involvement also gave administrators the opportunity to have teachers volunteer to teach the course, thereby establishing a core group of committed teachers who could work out the logistics of implementation before the mandatory date.

In contrast, those administrators who elected not to become involved in the mandatory implementation of CALM tended to be reactive, change resistant, uninterested in curricular change, status-quo, and concerned primarily with the technical and administrative dimension of implementation. However, these characteristics did not take into consideration the realities of administrative life. For some of these principals the implementation of change was equated with loss. The perceived trade-offs -- such as the elimination of locally developed courses, reassignment of teachers and the reduction of student choice -- were viewed as too great to warrant early involvement in CALM. Other principals who supported CALM did not become involved in the early implementation due to political, economic and technical constraints. Based on previous experience with the implementation of change, some administrators elected to wait until the mandatory implementation date when CALM had passed the "political litmus test," when they could be assured that the resources would be available, and when implementation problems had been worked out. Finally, there were those administrators for whom the implementation of the Secondary Education policy was overwhelming and too disruptive of their well established routines. It caused them to question their personal capacity to manage such changes and their professional identity if they failed. In the views of some administrators explained, reducing change was easier than going along with it.

3. What environmental factors influenced the implementation of CALM?

The implementation of CALM was influenced by economic, social and political factors at the provincial level and, consequently, defined the broad context in which CALM was embedded. In general, CALM was implemented during a period characterized by change and uncertainty. Economically speaking, Alberta experienced a major downturn in the economy in 1986 when the price of oil dropped from a high of twenty-eight dollars a barrel to a low of nine dollars a barrel. In 1987-88 the Alberta Government reduced funding to education by three percent which resulted in a reduction in general funding for schools and a major restructuring of Alberta Education. In response to the reduction in school operating grants school boards tightened their budgets, eliminated teaching positions, and reorganized some of their administrative structures.

Politically Alberta was also undergoing major changes due to the 1985 resignation of long time Premier, Peter Lougheed, and the 1986 election of the new Premier, Progressive Conservative Party leader, Donald Getty. The election of the new Premier brought a change in leadership style, an unclear vision for the future of Alberta and the loss of 22 of 83 seats in the legislature to opposition parties. During this same period Alberta Education underwent a second change in Ministers in one year when the Honourable David King was replaced by the Honourable Neil Webber, only to be replaced after a short period of time by the Honourable Nancy Betowski, who was new to politics and to the government. Hence, parents, teachers, administrators and Alberta Education personnel were all waiting to see where education was going to place in the government's list of priorities.

At the school district level administrators were grappling with the implementation of the Management and Finance Plan, the new teacher evaluation policy, and the impending changes in secondary education programs as a result of the *Secondary Education in Alberta* policy statement. Consequently, CALM was greeted by some as a career opportunity and the means to job security, while others viewed CALM as a threat to their area of specialization, and as an administrative nightmare to implement

## Conclusions

The following conclusions were based on the finding of the study and their subsequent analysis.

1. The implementation of CALM was a gradual process in which individuals at each stage of the implementation interpreted and responded to the initiative, assigning it a measure of value in terms of its congruence with their personal beliefs and interests as well as with its implications for their occupational identity, sense of competence and self concept. As CALM passed through these successive levels of implementation the actual content of the curriculum was not modified to any great extent; what differed was the value and priority that was ascribed to it during implementation.

2. While the provincial educational system is structured as a multilevel bureaucracy (i.e., Alberta Education, school districts, schools), the local level practitioner is subject to weak hierarchical control, making uniformity in the implementation of a provincial policy initiative difficult to control. As a policy initiative flows through the successive levels of implementation the direct control of policy-makers (Alberta Education) diminishes as the discretionary zone of the local implementers (teachers and administrators) increases. The problem for policy-makers becomes one of creating a policy initiative that is flexible enough to endure the successive levels of implementation and still maintain a degree of fidelity with the philosophy, goals and objectives of the initiative.

3. Alberta Education has the power to mandate curriculum; however, due to the organizational structure of the provincial educational system they have limited control over what really counts in implementation -- the delivery of the curriculum at the classroom level. It is at the discretion of teachers to interpret and bring to life what they perceive to be the intent of the curriculum. Thus, the role of Alberta Education is limited to enabling implementation through the provision of resources, funding, and inservice education for teachers. Government can mandate input (curriculum content), recommend methods of

program delivery, and monitor and evaluate output (student achievement); however, in reality they cannot mandate what actually takes place in the classroom.

4. The predominant model of curriculum implementation that emerged in the study was the "marketing model" adopted by the CALM Project Team. Integral to this model was a clear sense among implementers of what had to be done to implement the curriculum and how they were going to go about accomplishing this task. In the case of CALM, this meant that the implementers stayed within their mandate and dealt only with those issues or factors which related directly to the implementation of the curriculum. Marketing CALM required members of the Project Team to make personal visits to school sites to assist teachers with implementation, to develop resources that responded to the implementation needs of administrators and teachers, and to go through whatever formal or informal channels necessary to get the curriculum implemented within the prescribed timeframe.

5. The administration of a school can be instrumental in creating the atmosphere for change to occur. Principals can set the expectations and standards for excellence or for failure through the operational philosophy and goals of the school and the ascribed value of the policy initiative.

6. Some of the biggest obstacles to the implementation of a policy initiative is the lack of accurate and up to date information regarding the goals and objectives of the curriculum, the expectations of teachers and administrators in the implementation process, and how the policy initiative fits into the larger plan for educational reform. Essentially, local level implementers (teachers and administrators) want a tangible link between the expectations and intents of the policy makers and those of the policy implementers. This tangible link would serve as the undistorted channel for information, clarification and feedback. In the case of CALM the Project Manager fulfilled this role.

7. In the implementation of CALM the dissemination of accurate and complete information was integral to creating an awareness and understanding of the rationale, goals and objectives of the curriculum. However, awareness should not be equated with

understanding, understanding with acceptance, and acceptance with implementation. This kind of linear thinking does not take into account the realities of the life of the practitioner.

8. The cyclical nature of curricular reform suggests that curriculum is generated less out of possibilities (what ought to be) than in response to what already exists.

9. The adoption of a mechanistic-systems view of the implementation of a policy initiative with a focus on inputs (curriculum) and outputs (student achievement) defines effective implementation in terms of compliance. This may inhibit policy makers from hearing or seeing another view of the implementation process which accounts for the realities of practice in the classroom. Teachers are expected to comply with the overall plan and to fulfill their role as instructional experts in receiving directives, and producing results, thereby helping the educational system to achieve the goals and objectives of the policy.

## Implications for Future Policy Implementation

The following implications are based on the findings of the study and their implications for future policy implementation endeavors.

1. In devising a strategy for the implementation of a mandatory policy initiative it is important for the Department of Education to anticipate and plan for potential obstacles or impediments in the implementation process. This can be determined through consultation with participants in the successive levels of implementation regarding their perception of the possible repercussions or impact the initiative might have on their roles and responsibilities. The participants should have real opportunity to raise issues and voice concerns regarding the implementation of the policy initiative, and to assist in the development of the implementation plan. Implementation can fail when in the planning stages the realities of practice (that which is or is not feasible) are not taken into consideration.

2. In planning for the implementation of a policy initiative policy-makers must be remembered that even the best planned policy can fail in implementation because implementation is a human process subject to the idiosyncrasies of the participants. People tend to deal with change on two levels, intellectual and emotional. Thus, while people may appear to be intellectually prepared for the implementation of the policy initiative, it is not until they become involved in the process that the emotional impact comes to the fore. It is therefore beneficial for the Department of Education to have teacher inservice training sequenced to various stages in the implementation process. People have different needs depending upon their level of awareness and understanding of the initiative, and their level of involvement in or use of the curriculum.

3. It is apparent that Alberta Education is most involved in the implementation of a policy initiative during the very early stages. That is, they are most involved in initiating the implementation process through defining the implementation time-line, hosting information sessions, and providing resources such as implementation manuals, resource manuals, textbooks and curriculum guides. Therefore, teachers and administrators who do not implement the policy initiative until the mandatory year do not benefit from direct assistance from Alberta Education. By the time the mandatory implementation year arrives, the Project Team and the Steering Committee members responsible for the development and initial implementation of the curriculum have moved onto new projects. Thus, there needs to be a mechanism in place that provides new teachers with an opportunity to seek information, clarification, direction and support in implementation. In the case of CALM, the series of video tapes and the inservice manual are but one means of communicating Alberta Education's original rationale, goals and expectations for the implementation of the curriculum. This process, however, does not provide an opportunity for clarification and support in implementation.

4. Curricular change is a process and not an event. Therefore, the mere mandating of the implementation of a new curriculum does not ensure that the intended

goals and objectives will be realized at the classroom level. Change requires both time and patience. Teachers and administrators require a realistic amount of time to learn about the mandated change and how the implementation will affect their roles and responsibilities. Time permits the building of a commitment to implementation, whereas pressure can result in mere acquiescence to the mandate.

5. One of the recurring complaints expressed by school administrators and teachers was the lack of consultation by Alberta Education regarding the need for and content of the CALM curriculum. However, in the implementation of CALM, teachers were requested to adopt the "process approach" and to minimize passive learning of curriculum content. A process approach advocates cooperative learning and interaction with fellow students, active participation in the learning experiences, and on-going communication with and feedback from the teacher. It is ironic that while teachers are expected to adopt a process approach in teaching CALM, they are expected to play a passive role of compliance with the directives implicit in the policy initiative. Thus, that which is deemed appropriate interaction between teacher and student in the implementation of CALM is not consistent with the interaction between policy makers or implementers and teachers. If the process approach it to have validity in the eyes of teachers and students, then this approach ought to be mirrored in the interactions among participants at all levels in the implementation process.

6. There was considerable discussion among the participants in the study regarding the validity of the findings of the Secondary Education Review that resulted in suspicion among school personnel regarding the perceived political rather than educational motives behind some of the subsequent directives articulated in the Secondary Education in Alberta policy. Much of the problem underlying this atmosphere of suspicion was related to the lack of information and communication between Alberta Education and school personnel regarding how the findings of the Secondary Education Review were interpreted and translated into the Secondary Education in Alberta policy, and how the

policy was translated into directives for implementation. This lack of information and misinformation points to the need for continual communication between Alberta Education and school personnel at all stages (development and implementation) in the policy process. While government requires increased accountability for what takes place in the classroom (student achievement), similarly, educators are asking government to be more accountable for the educational policy decisions they mandate.

## Implications for Research and Theory

The following implications for theory development are based on the insights gained in conducting the study and analyzing the findings.

1. In describing and analyzing the implementation of policy from an interpretive perspective it is important to examine the preconditions that make certain interpretations of the process available. A historical perspective helps to reveal social, economic and political causes of action. The social structures and the predominant ideologies in which the participants are embedded further influences how they come to understand or view the implementation process. Therefore, in policy studies more emphasis should be placed on historical and current contexts.

2. Implementation of a particular policy cannot be described and analyzed in isolation from other policies. The researcher must be cognizant of how the particular policy is interconnected with other policies and with the achievement of broader government, societal or educational goals.

3. Case study methodology is useful in describing a process as it is occurring, helping to make explicit those factors which were most influential in determining the shape of the policy implementation process. This kind of information would be useful in designing an impact study to explain and assess the extent to which the goals and expectations of the policy were realized. As Rist (1982) once commented, "It is

dangerous politically and intellectually to rely on outcome measures while one is left to guess at the process" (p.440).

4. Descriptive implementation studies can be instrumental in determining why policies succeed or fail. The implementation process can be technically simple but socially complex. In other words, while the actual logistics of implementation may be straight forward, the human dimension of implementation renders the process more complex. Therefore, a two level study that examines what government did to make a policy operational and how practitioners came to view their role in the process helps to connect the world of policy makers and the world of school administrators and teachers and to make explicit the repercussions of government implementation decisions.

5. The use of predefined models such as the four organizational models of implementation described by Elmore (1978) are of limited use to policy analysts in their attempt to make sense of a particular policy implementation process. Models are only useful to the extend to which they are isomorphic with reality. However, educational policy is subject to the multiple realities of people involved in the successive bureaucratic levels of the implementation process. Therefore, to select any one model from which to analyze the implementation process would be to understand only one dimension of the process. What is needed is a conceptual framework that would permit key variables to emerge from the reality of the participants, with the gradual development of "particular" models of implementation descriptive of the reality at each level in the process.

## Areas for Future Research

The findings of the study related to the implementation of policy and the consequent management of change provide a number of opportunities for continued research in these areas. First, there is a need to examine the concept of leadership and the management of change. The *Secondary Education in Alberta* policy initiatives provide numerous opportunities to study the impact and management of secondary education reform. For example, it would be interesting to continue to observe how those schools that became involved in the voluntary implementation of CALM manage the implementation of subsequent *Secondary Education in Alberta* policy initiatives.

A second area of study would be to analyze critically the concept of "marketing" the implementation of educational change and the repercussions this kind of approach has on the role and image of the teacher in the process, and role of schooling in society. Questions such as "What kinds of incentives are used to market and maintain commitment to change?" and "What does the concept of marketing implementation suggest about the current state of educational reform?" Finally, a related area of study would be to reflect critically upon the kind of language teachers and administrators use to describe their involvement in curriculum implementation. This kind of analysis may lead to answers to such questions as " What does this language tell about their understanding of education reform in general, and their role in and commitment to the process in particular?"

## Reflections on Policy Implementation

Educational policy formulation and implementation has become a highly political process. Schooling (hence education) is one institution which affects the lives of the majority of the citizens. Children spend a considerable portion of their childhood and adolescence in schools; consequently, public education has a pervasive effect in influencing the lives of children. Schools have the responsibility of helping individuals to discover and achieve their potential and to become productive members of society. Through educational policy decisions are made regarding such issues as "By what means will children discover their potential?" "How will 'potential' be evaluated?" and "What constitutes achievement?" The skills, attitudes and knowledge necessary to help students to become "productive" or "contributing" members of society is also determined through policy decisions regarding curriculum content and core course requirements at the elementary, junior and senior high school levels.

Due to the pervasive impact that education has on the lives of children, and consequently society, it is publicly funded and publicly controlled. Supposedly educational policy is formulated in consultation with major stakeholder groups ensuring that they have a voice in policy decisions. However, some might argue that education has also become the arena in which policy-makers with political aspirations attempt to prove their capabilities by keeping education in the public eye. Educational policy can be a visible means by which government in general, and individual members of government in particular, can be seen as progressive, proactive, and in-tune with the needs and values of the electorate. The tendency of educators to search for alternative political agendas in mandated curriculum policy decisions may have a base in political realities.

A problem in the formulation of policy is the unequal distribution of power and influence among stakeholder groups. The politicians have the power ultimately to determine whose needs, values and opinions will be addressed in the policy decision. Policies tend to be articulated in a manner which is necessarily abstract in order to satisfy a broad range of needs and to set direction for future discretionary action. However, while the government may use the consultative mode in the formulation of policy, there is little evidence that this process is used in the interpretation or implementation of policy decisions. School administrators and teachers may become frustrated with mandated policy initiatives because they feel that they have had little say in the formulation of the policy, yet they are ultimately responsible for the implementation of the initiative at the classroom level. They may feel that their voice is limited to that of the "instructional expert," or to the professional organization, but the more important decisions such as the need for the policy initiative (i.e, mandated curriculum), or the substantive content of the initiative is left up to the experts at higher levels in the educational bureaucracy. It is at the classroom level where the true need and value of a curriculum policy initiative is tested as teachers interpret and convey it to the students. Depending on what happens in the classroom, the goals and expectations of the policy may or may not ever be realized.

In reflecting more specifically on the implementation strategy developed for the implementation of CALM a number of problems become apparent. First, the implementation strategy was based on the cascade model which used the dissemination of information to create an awareness and understanding among practitioner, parents, interested community groups and agencies regarding the goals and expectation of the curriculum. The implementation of CALM was based on the concept of a partnership in education. That is, the implementation of CALM was dependent upon the resources and assistance of cooperating government and community agencies, and the commitment of school boards to provide inservice training for CALM teachers. The idea was to create a locally initiated infrastructure and support network for the implementation of CALM. However, for this partnership concept to work, the participants have to perceive themselves as in actual fact being partners with the various agencies involved in implementing CALM. This can be difficult since the concept of partnership was imposed on the participants along with the mandated policy initiative. It would seem that the partners would need the opportunity to develop a sense of ownership in the development and implementation of the initiative and to have a voice in how they think the implementation ought to occur in a particular jurisdiction. As part of the Alberta Education implementation strategy consideration should be given to providing real opportunities for the participants to find out about the rationale, philosophy and intent of the curriculum, to raise issues and to voice their concerns regarding its implementation, and to be given the time to experiment with how best to implement it. While this sort of process does occur, the problem is that it often occurs in an unrealistic timeframe. Real change takes time and patience, it does not occur by simply making it mandatory. When mandated change occurs too rapidly and without consultation with practitioners there is a sense of loss of control over what it means to be an administrator or a teacher, and a certain anxiety over the future. For those teachers and administrators who identify with, believe in, and accept the mandated policy initiative, implementation can be viewed as an opportunity and a challenge. However, for those who are uncertain or at odds with the policy initiative, implementation can be viewed as a loss of personal power and control, or it can mean acquiescence to a change over which they exert little control. In these circumstances it is questionable that any real change occurs. A new curriculum may be taught, however the framework for thinking about it or teaching it remains the same. In sum, real change requires commitment to and a belief in the goals of the initiative.

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# APPENDIX A

## CHRONOLOGY OF EVENTS: SIGNIFICANT DOCUMENTS, DATES AND EVENTS

# APPENDIX A

## CHRONOLOGY OF EVENTS: SIGNIFICANT DOCUMENTS, DATES AND EVENTS

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|---|---|
| November, 1980 | Alberta. Interdepartmental Task Force on Health Education in Schools. (1980). *Report of the Interdepartmental Task Force on health education in schools*. Government of Alberta. |
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| March 28, 1988 | Government of Alberta. (1988). *Caring and responsibility: A statement of social policy for Alberta*. Edmonton: Author. |
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| (n.d.) | ACCESS Network. (1988). *Career and life management inservice guide*. Calgary: Alberta Educational Communications Corporation. |
| (n.d.) | Calgary Board of Education. (1988). *CALM student comments*. Calgary Board of Education Career and Life Management information brochure. Calgary: Author. |

## CHRONOLOGY OF EVENTS: GENESIS OF CALM

| | |
|---|---|
| 1972 | National Conference on School Health, Ottawa |
| 1974 | Department of National Health and Welfare report, *A new perspective on health of Canadians* |
| June, 1974 | Conference of Federal-Provincial Deputy Ministers of Health request that Federal-Provincial Advisory Committee on Community Health provide a report and recommendations on school health education in Canada |
| 1974-77 | Alberta Education establishes an ad hoc Committee to investigate health education in the province<br>- based on findings recommend need for the development of a comprehensive health curriculum<br>- numerous school districts had already developed standing committees on health, and had developed local curricula |
| 1976 | Conference of Provincial Ministers of Health<br>- decision that realistic goal for Canadians would be Healthful living through lifestyle choices |
| 1977 | Alberta Interdepartmental Task Force on Health Education in Schools<br>- Task force comprised of representatives from Social Services, Advanced Education and Manpower, Agriculture, Workers' Health, Safety and Compensation, Parks and Recreation, and Transportation<br>- identified critical health needs of school age children and made recommendations for education and health needs |
| 1980 | Report of the Interdepartmental Task Force on Health Education in Schools, Government of Alberta |
| 1983 | Alberta Education review of a number of courses in Alberta school curriculum for possible overlap with themes identified within the health curriculum that that was underdevelopment |
| 1984 | Elementary Health Curriculum becomes mandatory |
| 1984 | Secondary Education Review (Alberta Education) |
| 1985 | Proposed Senior High Health curriculum developed |

| | |
|---|---|
| June, 1985 | Secondary Education in Alberta Schools policy statement released<br>- puts freeze on all senior high programs that were in developmental stages. Policy sets new directions, goals and challenges for review and development of programs |
| December, 1985 | CALM project development proposal<br>- CALM to be disassociated from any existing curriculum, promoted as distinctly new<br>- reflects intent of Secondary Education policy |
| February, 1986 | Proposal for initial approval to develop CALM curriculum |
| March, 1986 | Approval to Develop CALM<br>- establish CALM Steering and Sub-Committees<br>- curriculum to cover 5 broad areas<br>- recommend curriculum involve parents and public and private agencies in the instructional programs, and should develop a partnership with the community in assisting students in career planning and training |
| July,1986 | Symposium at Barnett House<br>- reaction to draft CALM curriculum |
| March, 1986 | Orientation to CALM: Development Committee |
| August, 1986 | CALM inservice and orientation for first semester field test teachers |
| September, 1986 | Junior High Health curriculum<br>- Field Test (20 formal sites, 20 informal sites) |
| November, 1986 | Field Test Teachers, Semester 1: Debriefing and Problem Solving |
| January, 1987 | Revise Curriculum Guide and Resource Manual |
| January, 1987 | CALM inservice and orientation for second semester field test teachers |
| February, 1987 | Field Test Core Curriculum and Optional Modules (20 formal sites, 20 informal sites) |
| March, 1987 | Draft of CALM curriculum guide |
| May, 1987 | Debriefing of Field Test Teachers and discuss revision of Curriculum guide and Resource Manual |
| May, 1987 | CALM Interim curriculum guide |

| | |
|---|---|
| May, 1987 | Optional Modules, field test draft one |
| May, 1987 | Development of Video Inservice |
| June, 1987 | Teacher resource manual |
| June, 1987 | Approval of CALM program<br>- Resource package field tested |
| September, 1987 | Implementation of Prototype Program<br>(Local Board motion required) |
| April, 1988 | Administrators, Counsellors, and Teachers: CALM Implementation Manual |
| 1988 | CALM Access Inservice Guide |
| September, 1988 | Optional Implementation of CALM |
| September, 1989 | Mandatory Implementation of CALM |

# APPENDIX B

# CRITICAL HEALTH NEEDS OF SCHOOL AGE CHILDREN

# APPENDIX B

## CRITICAL HEALTH NEEDS OF SCHOOL AGE CHILDREN[3]

1. Knowledge and practice of oral hygiene
2. Knowledge of one's body systems and their functions
3. Knowledge and application of first aid
4. Maintaining personal appearance and hygiene
5. Maintaining physical fitness
6. Establishing appropriate eating habits
7. Making sensible food choices
8. Knowledge of communicable disease prevention (e.g. immunization, sexually transmitted disease, etc.)
9. Knowledge regarding methods of pregnancy prevention
10. Taking responsibility for protecting one's personal health
11. Developing the ability to assess one's personal health and learning when to seek help
12. Practising informed judgement in the use/non-use of drugs other than alcohol and tobacco
13. Practising informed judgement in the use/non-use of alcohol and tobacco
14. Developing positive recreational activities for one's leisure time
15. Awareness of occupational health hazards
16. Knowledge of the principles of sate motor vehicle operation
17. Acquiring skills necessary for the safety of self and others
18. Practising personal safety
19. Accepting responsibility for care of personal and community property
20. Knowledge of health services available in school (e.g. school nurse, dental hygienist, counsellor)
21. Knowledge of available health services in the community
22. Developing a positive self-concept, learning to fell good about oneself
23. Accepting and learning from the consequences of one's decisions or actions
24. Learning to assess available alternatives and make appropriate decisions
25. Developing an integrated value system
26. Developing the ability to accept one's feeling and to express them in an appropriate way
27. learning to handle conflict and frustration in a positive manner
28. Practising informed judgement in the choice of friends
29. Ability to deal positively with peer pressure
30. Learning to act independently
31. Leaning how to communicate effectively
32. Leaning how to relate with and get along with others
33. Establishing and maintaining rewarding family relationships

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[3] Source: *Report of the interdepartmental task force on health education in schools.* Government of Alberta, November, 1980, p.9.

# APPENDIX C

# OVERVIEW OF THE IMPLEMENATION PLAN FOR THE CALM CURRICULUM

# APPENDIX C

## OVERVIEW OF THE IMPLEMENATION PLAN FOR CAREER AND LIFE MANAGEMENT CURRICULUM (CALM)[4]

### 1. PRE-DEVELOPMENT/ANALYSIS PHASE
(November 1985 - March 1986)

**Preliminary Work**

- review previous development work
- preparation of a proposal for the development of the CALM curriculum for the Instructional Program Review Committee (IPRDC)
- approval from Minister of Education, the Honorable Neil Webber, to proceed

**Analysis**

A. Establish program proposal outlining development procedure, tentative credit allocation, and program structure.

B. Research related curriculum developments in and out -of- province, review literature to identify significant trends, and identify recommendations and concerns of opinion leaders. Analyze available data expectations and interests of groups such as students, recent graduates, youth and leaders.

C. Identify various interest groups and clarify role within the development process (development of content, validation or review of content, resource preparation, field test, teacher inservice).

### 2. DEVELOPMENT PHASE
(February 1986 - JuLY 1986)

A. Establish CALM Advisory Committee (Ad Hoc Committee)
-Establish CALM subcommittee for development of specific dimensions of the program

B. Establish contracts for developing curriculum learning units

C. Provide information to liaison contacts within Alberta Education, the educational community, and other government departments
-Establish other linkages: Formal and informal linkages among the various interest groups not directly involved in the ad hoc curriculum committee. When content involves specialized knowledge, interest groups should be invited to participate and/or to provide reaction. Program structure and plans for implementation should be vetted through school system personnel. In addition, contact with related

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[4] Source: *Career and life managment project development proposal.* Unpublished document, Alberta Education, December 12, 1985.

*Career and life management proposal for initial approval to develop curriculum.* Unpublished document, Alberta Education, February 5, 1986.

subject areas undergoing concurrent curriculum development should be maintained.

D. Identify principles of learning upon which the program is based
  -initiate research/consultation on process orientation to be used in CALM
  -initiate research paper on strategies for effective inservice

E. Host invitational symposium for views and opinions on proposed CALM curriculum

F. Identify appropriate learning resources

G. Create ACCESS video inservice tapes to be broadcast on the ACCESS T.V. network. Teacher inservice program will have an interactive component

## 3. RESOURCE IDENTIFICATION

A. Invite commercial publishers to submit proposals for resource development

B. Screen/analyze field test resources

C. Field test custom publisher developed resources

## 4. VALIDATION

(September 1986 - May 1987)

A. Invitational Symposium
  -Invite individuals representative of all stake-holding groups affected by or interested in CALM.
  -have them respond to the draft CALM curriculum and express additional concerns or issues.

B. Field test curriculum documents, implementation materials and proposed learning resources
  -invite nominations for teachers to field test curriculum
  -select field test sites (20 formal sites and 20 informal sites for each semester)
  -conduct field test
  -monitor field test locations
  -conduct interim field test teacher meetings
  -conduct field test debriefing sessions

C. Various interest groups would also be asked to validate curriculum documents and resources.

## 5. IMPLEMENTATION

(May 1987 - September 1989)

A. Pre-implementation: Communicate program intents, structure, resource expectations to school jurisdiction administrators, curriculum leaders and teachers. Possible strategies include regional meetings, symposiums, newsletters

B. Involve regional office personnel in program implementation and evaluation

C. Inservice teachers with respect to program expectations, available resource support, and recommended teaching strategies

D. Optional Implementation beginning in September, 1987.
  -program monitoring, fine tuning, ongoing consultative support.

E. Mandatory implementation was scheduled for September, 1987, however modifications to the program in response to recommendations of the field tests as well as time for resource development pushed the mandatory date up to September, 1989.

F. Consultation Support
    -resource changes, curriculum updates, zenith number, computer networks, consultation (travel).

## 6. EVALUATION PHASE

(September 1990 - June 1991)

A. Establish referent points for evaluation through ongoing input from advisory committees and other interest groups

B. Maintain lines of communication, regarding effectiveness of program through:
    -regional offices
    -input from school and system personnel
    -input from public and private agencies

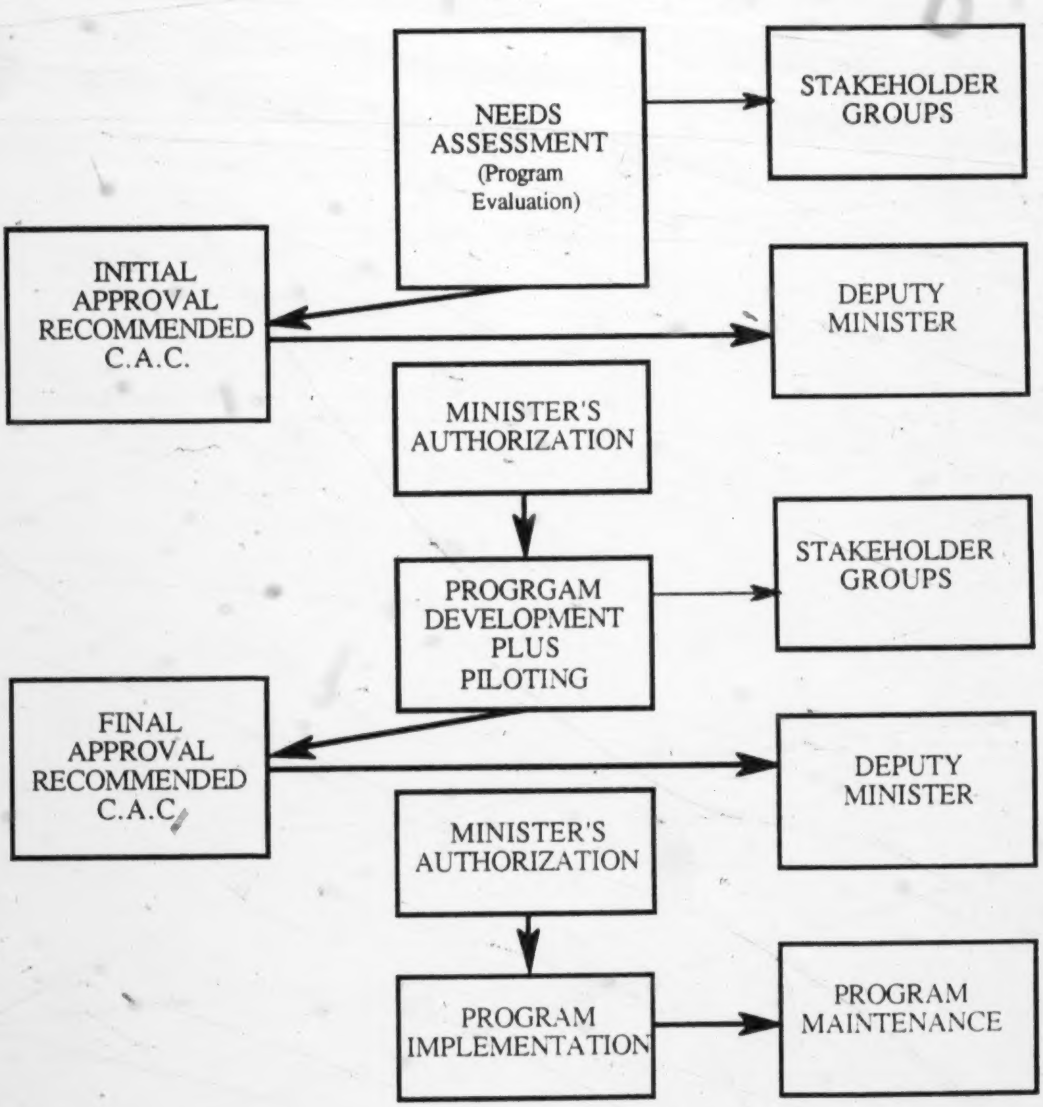
# APPENDIX D

# CURRICULUM DEVELOPMENT CYCLE

# APPENDIX D

## CURRICULUM DEVELOPMENT CYCLE *(Under Review)*

### Curriculum Decision Making


NEEDS ASSESSMENT (Program Evaluation)
STAKEHOLDER GROUPS
INITIAL APPROVAL RECOMMENDED C.A.C.
DEPUTY MINISTER
MINISTER'S AUTHORIZATION
PROGRGAM DEVELOPMENT PLUS PILOTING
STAKEHOLDER GROUPS
FINAL APPROVAL RECOMMENDED C.A.C.
DEPUTY MINISTER
MINISTER'S AUTHORIZATION
PROGRAM IMPLEMENTATION
PROGRAM MAINTENANCE

→ Communication as is appropriate

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SOURCE: Orientation to the Career and Life Management Curriculum Development Committees. Unpublished document. Alberta Education, March, 1986, p. 17.

# APPENDIX E

## MEMBERSHIP ON THE CAREER AND LIFE MANAGEMENT STEERING COMMITTEE AND CURRICULUM SUBCOMMITTEES

# APPENDIX E

## MEMBERSHIP ON THE CAREER AND LIFE MANAGEMENT STEERING COMMITTEE AND CURRICULUM SUBCOMMITTEE[5]

### Administration and Project Team

The CALM program was developed within the Senior High School Program Unit, Curriculum Branch, Alberta Education.

Gary Popowich, Associate Director
Sharon Prather, Program Manager
Ardis Kamra, Learning Resources Officer
Diane Smith, Curricular Assistant
Janet Forest. Learning Resources Assistant

### Steering Committee

Wes Brooks, Grande Prairie Composite High School

Carol Cameron, Community Health Division, Alberta Community and Occupational Health

Sandra Darrell, Community Health Division, Alberta Community and Occupational Health

Barrie Day, Training Services, Alberta Career Development and Employment

Char Deslippe, Father Patrick Mercredi School, Fort McMurrary

Peter Ditchburn, Strathcona-Tweedsmuir School

Maryanne Doherty, Faculty of Home Economics, University of Alberta; Calgary Regional Office

Bart Eisen, Student Personnel Services, County of Smoky Lake

Bonnie Ewayshyn, Training Services, Alberta Career Development and Employment

Sondra Goodman, Student Services Department, Calgary School District No. 19

Lawrence Hrycan, Ponoka Composite High School

Grace McPike, Secondary Education, County of Strathcona

Ken Shields, Consumer Education and Information, Alberta Consumer and Corporate Affairs

Bruce Stewart, Special Educational Services, Alberta Education

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[5] Source: *Career and life management 20: Interim curriculum guide.* Alberta Education, 1987.

## Sub-Committees

Three sub-committees were established to make recommendations to the Career and Life Management Steering Committee. They included a Careers Sub-Committee, a Life Management Sub-Committee, and a Financial Management Sub-Committee. Sub-Committee members were selected for their expertise within these areas and were expected to focus on specific content contained within the Career and Life Management program.

Carol Cameron, Community Education Services, Alberta Alcohol and Drug Abuse Commission

Don Chomyc, Guidance, Counselling and Career Development, Edmonton School District No.7

John Edey, Harry Ainlay Composite High School, Edmonton

John McNeil, Sir Winston Churchill Senior High School, Calgary

Norma Mitchell, Family Financial Counselling, Alberta Consumer and Corporate Affairs

Doreen Pritchett, St. Francis Senior High School, Calgary

Dan Reilly, Camille J. LeRouge Collegiate, Red Deer

John Seaborn, Health Education, Alberta Community and Occupational Health

Helen Siemens, Home Economics/Health/Family Life, Calgary School District No.19

Donna Starr, Calgary School District, No. 19

Carol Steen, Counselling and Special Programs, Lethbridge Collegiate Institute

Faye Wiesenberg, Career Information Services Branch, Alberta Career Development and Employment

# APPENDIX F

# LIST OF FORMAL INTERVIEWS

# APPENDIX F

# LIST OF FORMAL INTERVIEWS

## Steering Committee

Sandra Darrel, Community Health Division, Alberta Community and Occupational Health (October, 1987)

Barrie Day, Training Specialist, Alberta Career Development and Employment (October, 1987)

Ken Shields, Consumer Education and Information, Alberta Consumer and Corporate Affairs (October, 1987)

Peter Ditchburn, Headmaster, Strathcona-Tweedsmuir School (February, 1988)

Maryanne Doherty, Faculty of Home Economics, University of Alberta, Calgary Regional Office of Education (October, 1987)

Sondra Goodman, Student Services Department, Calgary School District No.19 (February, 1988)

Lawrence Hrycan, Teacher, Ponoka Composite High School, County of Ponoka No. 3 (February, 1988)

## Alberta Education

Reno Bosetti, Deputy Minister of Education (1986, 1988)

David King, Minister of Education (1986)

Laura Mann, Edmonton Regional Office, Alberta Education (February, 1988)

Garry Popowitch, Associate Director of Senior High Program Unit, Curriculum Development Branch, Alberta Education (February, 1987)

Sharon Prather, CALM Program Director, Alberta Education (February, 1987; June, 1988)

Lloyd Symyrozum, Director of Curriculum Development Branch, Alberta Education (February, 1987)

## School and School District Administration

Nestor Chorney, Principal, Crow's Nest Consolidated High School, Crow's Nest Pass (February, 1988)

Peter Ditchburn, Headmaster, Strathcona-Tweedsmuir School, Okotoks (February, 1988)

Len Hanick, Superintendent of Program Services, Edmonton Catholic Board of Education (February, 1988)

Diane Field, Supervisor of Home Economics/Health/Family Life, Calgary Board of Education (March, 1988)

Keith MacKay, Supervisor of Practical Arts, Calgary Roman Catholic Separate Board (March, 1988)

Don Munro, Assistant Principal, M.E. LaZerte High School, Edmonton Public Board of Education (April, 1988)

Len Luders, Principal, Lindsay Thurber Comprehensive High School, Red Deer (February, 1988)

Warren Phillips, Assistance Superintendent, County of Mountain View (telephone interview), (February, 1988)

Al Pollack, Principal, Strathmore High School, Strathmore Alberta (June, 1987; February, 1988)

Csaba Rolincza, Principal, Matthew Halton Community School, Pincher Creek, Alberta (February, 1988)

Ron Sheppard, Principal, McNally Senior High School, Edmonton (April, 1988)

Helen Siemens, Specialist, Home Economics/ Health/ Family Life, Calgary Board of Education (May, 1988; October, 1988)

**Teachers**

Benita Bannerman, Teacher, Lindsay Thurber Comprehensive High School, Red Deer (February, 1988)

Louise Bleire, Teacher, Strathmore High School, Strathmore (February, 1988)

John Braun, Guidance Counsellor, Matthew Halton Community School, Pincher Creek (February, 1988)

Viki Brown, Teacher, Central Memorial High School, Calgary (June, 1988)

George Hildebrant, Teacher, Sir Winston Churchill High School, Calgary (October, 1988)

Betty Leadbeater, Teacher, McNally High School, Edmonton (April, 1988)

Merv Lutes, Guidance Counsellor, M. E. LaZerte High School, Edmonton (April, 1988; October, 1988)

Cathy Macleans-Sterns, Guidance Counsellor, Central Memorial High School, Calgary (June, 1988)

Darla Maxwell, Teacher, West View Secondary, Calgary (June, 1988)

Jim McConnell, Teacher, Strathcona-Tweedsmuir School, Okotoks
(February, 1988)

Bonnie Nutall, Teacher, Sir Winston Churchill High School, Calgary
(June, 1988)

Peggy Wightway, Teacher, Sir Winston Churchill High School, Calgary
(June, 1988)

### Other Support Agencies

Ann MacKay-Drobut, Women's Secretariat, Government of Alberta (February, 1988)

Rick LaPlante, Alberta Catholic School Trustees' Association, Coordinator of Religious Education Services (February, 1988)

### Students

Strathmore High School, Strathmore (February, 1988)

Lindsay Thurber Comprehensive High School, Red Deer (February, 1988)

## Conferences Attended

| | | |
|---|---|---|
| CALM Steering Committee Meetings | Edmonton ( three sessions) | May-June, 1987 |
| Custom Publishing | Edmonton Inn | May, 1987 |
| Information Sessions | Calgary and Edmonton | June,1987 |
| ACSTA | Religious Education Services Liaison-Specialists' Meeting<br>Theme: Implementation of CALM in Alberta Catholic Schools<br>"Leap into 1993" | February, 1988 |
| Students at Risk | Phi Delta Kappan, University of Alberta Chapter, Edmonton | October, 1988 |

# APPENDIX G

# INTERVIEW QUESTIONS

# APPENDIX G

## INTERVIEW QUESTIONS

### CALM Steering Committee Members

1. How did you come to be a member of the CALM Steering Committee?
   -what is your background?
   -why do you think you were selected?

2. What do you perceive to be your role as a member of the CALM Steering Committee?
   -what did you do?
   -how did the committee work together?
   -were there any problems or obstacles that the Committee encountered in the development of CALM?

3. How would you describe or define the CALM curriculum?
   -what are its goals and objectives?
   -in your opinion what were the significant factors that influenced the shape of the CALM curriculum?

4. In your opinion why did Alberta Education decide to develop the CALM curriculum?
   -origin of the curriculum?

5. What are the prevalent issues and concerns that now face the Steering Committee?

### Administrators

1. How did you first learn about the CALM curriculum and how did you become involved in its development and/or implementation?

2. How would you describe the CALM curriculum? How would you define the purpose or intent of the curriculum?

3. In your opinion how did CALM come into existence? Where did it come from and what needs (if any) do you feel that it addresses?

4. From your perspective what is the general reaction to and support for CALM at the various levels of implementation? (i.e., Administration, Teachers, Students, Community, Government).

5. How would you describe or define your role in the development and/or implementation the CALM curriculum?

6. How do you cope with the implementation of a mandated curriculum such as CALM? What factors, issues and concerns influence the kind of coping strategy that you have adopted?

7. What factors influenced your decision as to when you would become involved in the implementation of CALM?

8. Do you have an implementation strategy, and if so how was it developed? What significant factors, issues and concerns influenced the development of this strategy?

9. How do you go about selecting teachers to teach the CALM curriculum?

10. At what point in the implementation process do you expect the most guidance and assistance in the implementation of CALM? From whom and in what form do you expect guidance and assistance? How do these issues and concerns affect your implementation decision and strategy?

11. Do you have any additional comments regarding the development or implementation of the CALM curriculum? Can you suggest any additional areas (i.e., issues, concerns, incidents) related to the development and implementation of CALM that I should be covering? Can you recommend any people that might be of assistance in providing further insights into the development and implementation of CALM (i.e., administrators, teachers, parents, students) that I might interview? Can you suggest any additional kinds of questions that I should be asking?

# APPENDIX H

## LETTER TO REQUEST ACCESS TO CONDUCT INTERVIEWS IN SCHOOLS

55 Bellevue Crescent
St. Albert, Alberta
T8N 0A5
March 16, 1988

Dear Ms. Janelle Holmes,

I am a graduate student at the University of Alberta completing my Ph.D. in Educational Administration. My research focus is the implementation of the Career and Life Management curriculum in the province of Alberta. The purpose of this letter is to request permission to conduct one hour interviews with four Career and Life Management teachers and their principals. For the principals the purpose of the interviews would be to determine what factors influenced their decision to implement the curriculum before the mandatory date, their expectations of others involved in bringing about the change (Alberta Education, Regional Office, School Board, Teachers, and so on), as well as to explore their philosophy with regard to leadership and planned change. At the teacher level the interviews would focus on their perception of the problems and concerns that they have encountered in the implementation process, and their perception of the student's response to the curriculum. I would also like to talk to other people that have played a significant role in managing the implementation of the Career and Life Management curriculum.

It is my belief that this study will be useful to Administrators and School Boards in Alberta in understanding those factors that have been influential in determining the shape and direction of the implementation of the first policy initiative from the Secondary Education Policy Statement. In addition the Career and Life Management curriculum is particularly significant in the that it is the first new curriculum to be mandated in the Senior High Schools since the grade 10 Physical Education curriculum. For your further information I have enclosed a summary of my research proposal. I have also sent a copy to Dianne Field. I am looking forward to hearing your response to my request. Thank you for your assistance in dealing with this matter.

Sincerely,

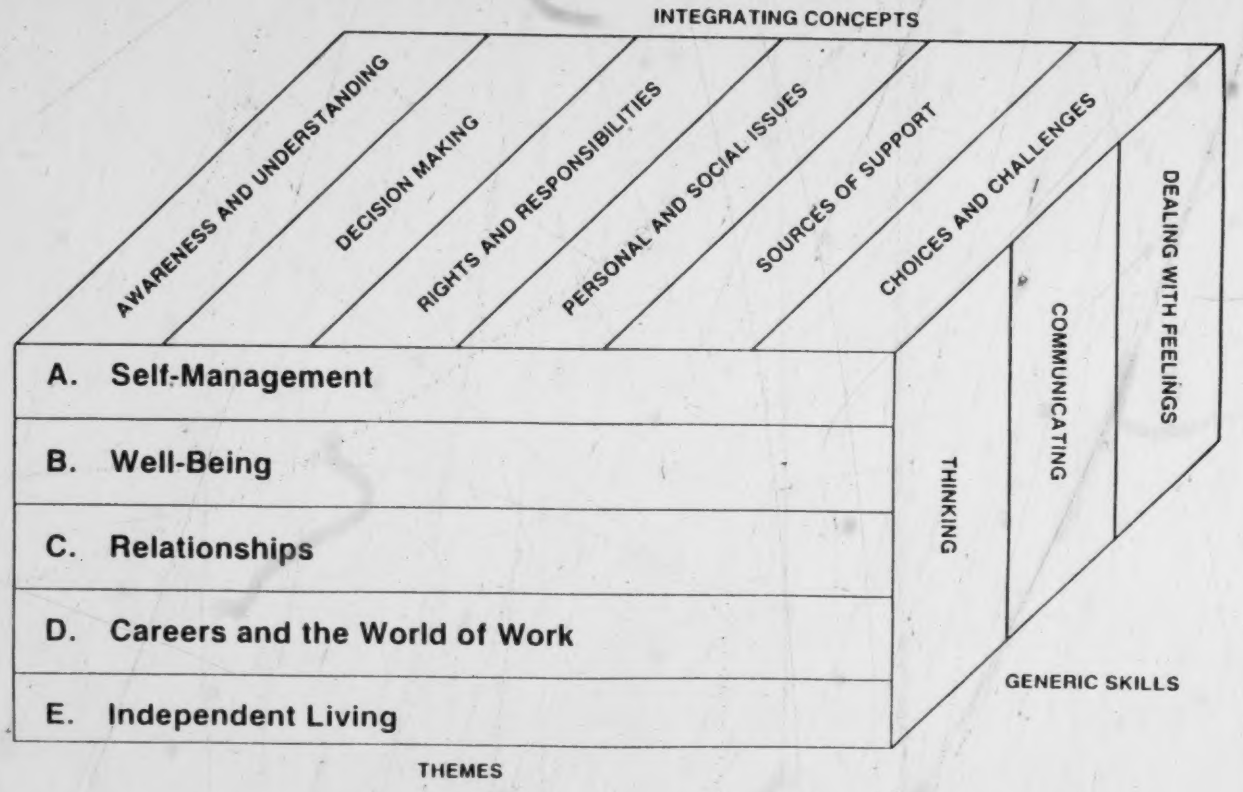
Lynn Bosetti

# APPENDIX I

# THEMES, CONCEPTS AND SKILLS

# APPENDIX I

## THEMES, CONCEPTS AND SKILLS


INTEGRATING CONCEPTS
AWARENESS AND UNDERSTANDING
DECISION MAKING
RIGHTS AND RESPONSIBILITIES
PERSONAL AND SOCIAL ISSUES
SOURCES OF SUPPORT
CHOICES AND CHALLENGES
A. Self-Management
B. Well-Being
C. Relationships
D. Careers and the World of Work
E. Independent Living
THEMES
THINKING
COMMUNICATING
DEALING WITH FEELINGS
GENERIC SKILLS

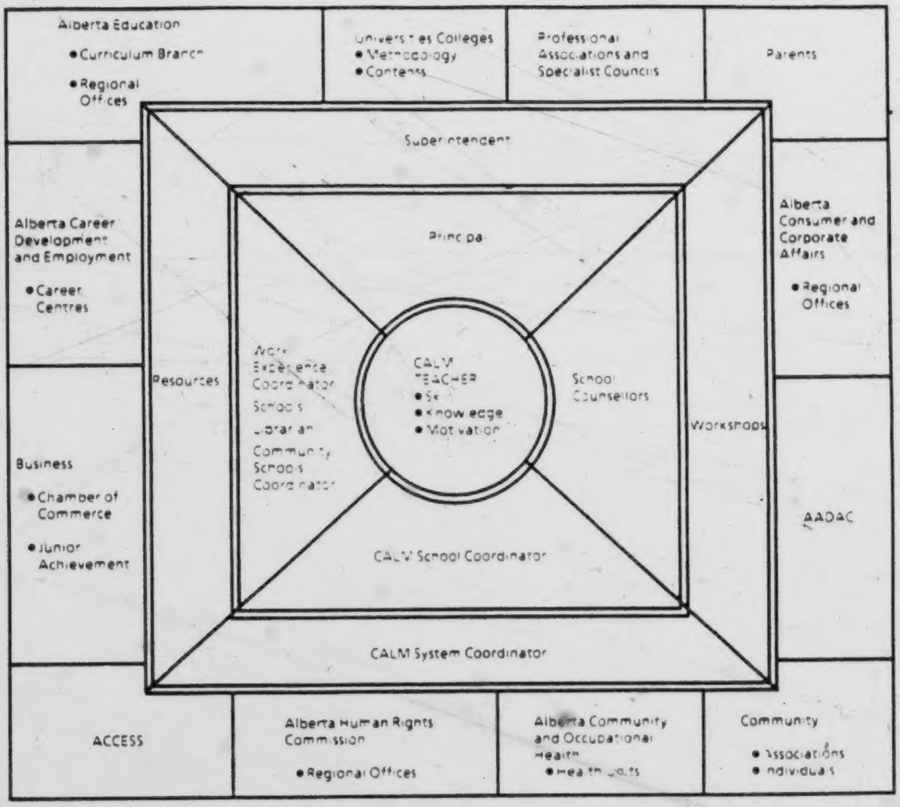
Source: *Career and life management 20: Interim curriculum guide.* Alberta Education, 1987.

# APPENDIX J

# CALM SUPPORT NETWORK

# APPENDIX J

## CALM SUPPORT NETWORK


Alberta Education
●Curriculum Branch
●Regional Offices
Universities Colleges
●Methodology
●Contents
Professional Associations and Specialist Councils
Parents
Superintendent
Alberta Career Development and Employment
●Career Centres
Principal
Alberta Consumer and Corporate Affairs
●Regional Offices
Resources
Work Experience Coordinator
Schools Librarian
Community Schools Coordinator
CALM TEACHER
●Skill
●Knowledge
●Motivation
School Counsellors
Workshops
Business
●Chamber of Commerce
●Junior Achievement
AADAC
CALM School Coordinator
CALM System Coordinator
ACCESS
Alberta Human Rights Commission
●Regional Offices
Alberta Community and Occupational Health
●Health Units
Community
●Associations
●Individuals

Source: *Career and life management 20: Interim curriculum guide.* Alberta Education, 1987.